
Sugar Sell 12.0 (Q2 2022) Release Notes

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Overview

This document describes the changes and functionality available in Sugar® Sell 12.0.0 (Q2 2022). Beginning with this release, Sugar Sell will be available in three Editions: Sugar Sell Premier, Sugar Sell Advanced, and Sugar Sell Essentials. While version 12.0 is available for both SugarCloud and on-site deployments, all Editions of Sugar Sell are supported exclusively on Sugar's cloud servers.

For information about any changes to existing functionality in this release, you can also refer to the [What to Expect When Upgrading to 12.0](#) article.

Feature Enhancements When Upgrading From 11.3 (Q1 2022)

12.0 Features Common to All Sell Editions

The following features and enhancements are new for all Editions of Sugar Sell 12.0.0 (Q2 2022):

Integration Enhancements

- [Third-party cloud-drive integrations](#): The new Cloud Drive dashlet lets you access and interact with your Google Drive or Microsoft SharePoint and OneDrive files from any dashboard in Sugar.
- [DocuSign integration](#): Users with a paid account for DocuSign can use the integration to send documents from Sugar to DocuSign for electronic signatures.

Look and Feel Enhancements

- **Updated user interface**: We have continued modernizing the look and feel of Sugar! The latest improvements include updates to UI elements in the navigation bar, footer, global search, dashboards, list and record views, alert pop-ups, notifications, and more.
- **List View improvements**

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- [Pagination](#): Most lists in Sugar (e.g., list views, subpanels) are now broken up into pages instead of one large list of records to make navigating the results and getting the record count easier.
 - [Frozen header row](#): The header row on most list views will remain visible when scrolling down a long list of records.
 - [Frozen first column](#): The first column of most list views can now be frozen so that it remains visible when scrolling horizontally to view more columns.
 - [Collapsible filter panel](#): You can now minimize in-progress filters (i.e., unsaved filters or saved filters that have been edited) on list views to increase the screen space available below for returned list results.
 - [Set preferred sending account for emails](#): You can now choose which of your email accounts to prioritize in the "From" email dropdown.
 - [Sugar product and version information in Help pane](#): Users can now quickly find their Sugar instance's version and their assigned CRM solution licenses (e.g., Sugar Sell Advanced or Sugar Serve) via the Help link in the footer.

Administration Enhancements

- [Comparison Language shown in Dropdown Editor](#): When editing dropdowns in Admin > Studio > Dropdown Editor, you can now see the labels in a comparison language to quickly identify labels that are not translated or not translated correctly.
- [More support for dropdown-conditional and role-based layouts](#): The Record View Dashlet and Preview View layouts now support dropdown-conditional and role-based layout definitions.

Sales-Focused Enhancements

- **Revenue line items on the Opportunity Record View dashlet**: By default, related revenue line items are now shown in the Opportunity Record View dashlet on Focus Drawer dashboards.
- [Sales stage classifications](#): Each sales stage (e.g., "Prospecting") can now be classified as "Open", "Closed Won", or "Closed Lost" to better control the intended meaning of stock and custom sales stages for your business processes.
- **Forecast Improvements**
 - **Updated look and feel**: Updates to column names, buttons, and the worksheet header make for a better and more intuitive user experience for sales agents and managers.
 - [Make personal and team forecast commitments](#): Sellers and sales managers can now make individual and team commits without tying that revenue to specific deals or sales agents, allowing them to

apply historical context and seller's instinct to the real-time deal data they get from Sugar.

- [Highlight unsaved changes on seller forecast worksheet](#): When a sales agent updates a value on their forecasting worksheet, the changes are now highlighted until they save their changes.
- [Active and inactive Product Catalog items](#): A new "Status" field in the Product Catalog module allows you to designate which products are currently available to sell to your customers and controls which products can be related to another record by default.
- [UI Improvements to Product Catalog dashlet](#): A preview icon is now available in the Product Catalog dashlet that allows you to view the record details prior to adding the product as a line item.
- [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.
- [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.
- [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.

Service-Focused Enhancements

Several capabilities that were previously available to only Enterprise- or Serve-licensed users have also been made available to Sugar Sell users in 12.0.

- [Case Management](#)
- [Release Management](#)
- [Bug Management](#)
- [Stock Customer Service Reports](#)

Additional Capabilities When Upgrading to 12.0 Sell Advanced

In addition to the [shared Sell features](#) listed above, customers upgrading to 12.0 Sell Advanced will have these additional features:

- **Improved Sugar Market and Sugar Sell Integration**: "Lead Score" and

"Interest Prediction Score" have been added to lead and contact records. Customers with an integrated Sugar Market instance can sync these field values from Market to their CRM via the Market-side sync settings.

- **Sugar Hint built into Sugar:** Customers who use Sugar Hint will no longer need to maintain a module loadable package because the functionality has been built into Sugar's code base and can be enabled via license key.
- [Improved Sugar Hint data in APAC:](#) If your instance is hosted in the Asia/Pacific region, your service will connect with data provider services located in that region for more accurate data results.
- [Hint Insights dashlet update frequency:](#) News articles are now published to the Hint Insights dashlet within 1 hour of being published online.

Furthermore, customers upgrading to Sell Advanced from a non-Sell product (Enterprise or Professional) will have access to the following Sell capabilities that were not available in their previous subscriptions:

New Sell Capabilities Coming From Ent 11.3	New Sell Capabilities Coming From Pro 11.3
<ul style="list-style-type: none"> • Active Subscriptions Dashlet • Automated Renewal Pipeline Creation • Business Centers • Coterminous Add-ons • Doc Merge • Dropdown-Based Views • Focus Drawers • Knowledge Base Search Dashlet • Messages • Purchase History Dashlet • Purchased Line Items • Purchases • Renewals Console • Sales-Focused SugarBPM Templates • SugarLive 	<p>Everything in the left column, plus:</p> <ul style="list-style-type: none"> • Action Buttons • SugarBPM + Sales-Focused Templates • Shifts and Shift Exceptions • Holidays • Sugar Portal • Comment Log Dashlet • Escalations • Advanced Reports • Role-Based Dropdown Lists • Role-Based Record Views

Additional Capabilities When Upgrading to 12.0 Sell Premier

In addition to the [shared Sell features](#) and the [Sell Advanced features](#) listed above, customers upgrading to 12.0 Sell Premier will have this additional feature:

- [Geo-locating services \(mapping\):](#) Sugar Sell Premier users can view their records on content-rich, interactive maps right in Sugar.
 - **Get directions:** Plot driving directions between records or from

your location.

- **Find nearby:** Filter records by proximity to a zip code or record.
- **Share and export:** Share mapped data by email or PDF.

Fixed Issues When Upgrading From 11.3 (Q1 2022)

The following issues are resolved in version 12.0.0 (Q2 2022) when upgrading from the 11.3 (Q1 2022) release. [Case portal users](#) can use the following links for more details about each issue:

- [89327](#): Issues with the SOAP API may cause unexpected behaviors or errors to occur when using certain applications or integrations with Sugar.
- [89189](#): Relate fields incorrectly display as HTML links in Matrix reports.
- [89137](#): Drilling through bar charts in reports may not work as expected in certain circumstances.
- [89116](#): Clicking the Recalculate Values option from the Quoted Line Items list view does not work as expected.
- [89063](#): Recalculating calculated fields for opportunities or revenue line items may take longer than expected.
- [89056](#): When using the Horizontal or Vertical Bar (Grouped) chart type on a report and a secondary grouping exists, the data is incorrectly stacked within the bars instead of being grouped.
- [89018](#): In certain circumstances, a large number of bar charts may not render correctly in report results or in the Saved Reports Chart dashlet.
- [88998](#): Scrolling the report chart in the Saved Reports Chart dashlet may not work as expected if the data exceeds the size of the dashlet width.
- [88959](#): Searching based on last name, first name format in the Users module's Reports To field does not work as expected.
- [88941](#): Funnel charts do not display values as expected in reports.
- [88808](#): The contact record's related tasks may not appear in the Contact Timeline dashlet as expected.
- [88724](#): Clicking "SugarCloud Insights" from the Admin page in version 11.3.0 does not open up the SugarCloud Insights page 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.
- [88700](#): PHP warning errors unexpectedly appear in PHP error logs across SugarCloud instances.
- [88642](#): Inserting dynamic images into PDF manager templates may not work as expected and result in an error.
- [88565](#): The Save and Cancel buttons are missing in the Project Tasks edit

view.

- [88556](#): Generating reports (e.g., Rows and Columns report) with cases and related notes does not return any records in the report result.
- [88514](#): Doc merge fails with an error when using a document template containing currency fields.
- [88480](#): When using the Sugar Plug-in for Microsoft Excel, dragging the Sugar report to a cell on the Excel sheet displays an error message.
- [88252](#), [86138](#): When using Sugar running on an Oracle database, users may run into Oracle database errors in certain circumstances.
- [88178](#): Union queries with missing parentheses when using SugarQuery objects may not work as expected and cause a MySQL syntax error.
- [88134](#): In certain circumstances, clicking the "More revenue line items..." link in the Revenue Line Items subpanel may cause the Likely, Worst, and Best amounts to display incorrectly in the related opportunity's record view.
- [87985](#): When the case's Primary Contact Name field is marked as required in Admin > Studio, attempting to delete any cases with a related primary contact fails with an error.
- [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.
- [87791](#): When email templates with attachments are created in the legacy user interface, the attachments do not display in the template as expected when viewed in the Sidecar user interface.
- [87441](#): Filtering the Address Book in the Emails module may result in a 500 error for users assigned to certain role restrictions.
- [87232](#): In certain circumstances, duplicate email campaigns may be sent out multiple times from the system.
- [86676](#): Enabling the Activity Stream Purger scheduler may cause unexpected errors to occur in Sugar for users.
- [86431](#): Removing certain fields (e.g., Attachments, Tags) from the Preview layout may cause the field to disappear from Studio for certain modules (e.g., Knowledge Base, Notes).
- [86128](#): The Product Catalog dashlet becomes unusable when there are a large number of product templates and product categories.
- [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.
- [84524](#): Adding a SetValue dependency to the Quotes module improperly removes the "Cancel" and "Save" buttons from the Quotes Configuration page.
- [83226](#): Cases created from inbound emails do not respect the default Priority value set in Admin > Studio.
- [83101](#): Changes made to reports in the Saved Reports Chart dashlet do not get updated automatically causing unexpected issues when users drill through the report chart in the dashlet.

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- [82729](#): In certain circumstances, filtering reports using a DateTime-type field causes unexpected issues in the report results including incorrect dates in the report query.
 - [82502](#): In certain circumstances, reports grouped by "Fiscal Year: Date Created" may display the wrong fiscal year in report results.
 - [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.
 - [81279](#): When creating new opportunities, the Revenue Line Items subpanel may not properly respect the Forecast Range settings and incorrectly display "Exclude" in the Forecast field.
 - [81061](#): In certain circumstances, setting the "Bar chart value placement" for the Saved Reports Chart dashlet may cause large values to be rounded incorrectly.
 - [80729](#): Advanced reports containing a multibyte string appear unreadable on the exported CSV file.
 - [72432](#): Creating a report for the Quoted Line Items module using the Discount Amount field as a display column fails to generate with an error.

Known Issues

The following known issues are present in version 12.0.0 (Q2 2022). [Case Portal users](#) can use the following links for more details about each issue:

- [89457](#): The search bar in SugarLive does not work in instances that include Hint (e.g., Sugar Premier instances).
- [89147](#): When a Summation With Details report is grouped using more than one field, invalid characters may display in the report results.
- [89114](#): Funnel charts may not display properly when viewed in reports and dashlets.
- [89078](#): In certain circumstances, the navigation bar may not display correctly after upgrading to version 11.3. For information on the workaround, refer to the issue's description on the bug portal.
- [88957](#): In certain circumstances, performing a global search in Sugar may result in a 500 error.
- [88587](#): The titles used for left-hand Calendar panels may not properly set users' expectations for the calendars that are available.
- [88532](#): When sending emails using an email template containing an attachment, the attachment does not get included in the email as expected.
- [88436](#): When a user does not have access to the calendar due to teams permissions, the calendar still appears as an option in the Calendar UI under "My Calendars".
- [88374](#): Attempting to reorder the columns in the Worksheet Columns

Preview list view in Admin > Quotes Configuration does not work as expected. As a workaround, remove all the fields from the Worksheet Columns section then add the fields again to the section.

- [88358](#): Installing packages via Module Loader may fail with a PHP fatal error.
- [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.
- [88206](#): In certain circumstances, installing packages in Module Loader may not work as expected and the package may get uninstalled with errors.
- [88188](#): Drilling through report charts may not work as expected for Summation-type reports filtered or grouped a certain way.
- [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.
- [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.
- [87698](#): For instances that use SugarIdentity, if an admin impersonates a user and the access token expires, the admin user improperly begins to impersonate their own user account once the user's impersonation session ends.
- [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.
- [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

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- 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.
 - [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 issue'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.
 - [86285](#): In certain circumstances, users may experience unexpected behaviors when attempting to expand a subpanel or edit an empty Subpanel layout in Admin > Studio. For information on the workaround, refer to the issue'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](#): Installing 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.

- [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.
- [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.
- [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.

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- [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 issue's description on the bug portal to convert the decimal fields.
 - [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.
- [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 12.0.0 (Q2 2022) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 12.0.x Supported Platforms](#).

Upgrade Paths

Sugar Serve and Sugar Sell Upgrade Paths

The following upgrade paths apply to Sugar Serve and Sugar Sell Premier, Advanced, and Essentials:

Package	From Version(s)	MySQL
New Installs		☐
11.3.0-to-12.0.0	11.3.0	☐

integrations_panel

uiux_panel

activity_panel

admin_panel

bpm_panel

sales_panel

service_panel

portal_panel

new_ent_panel
