
Sugar Ultimate 10.0.0 (Q2 2020) Release Notes

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Sugar Ultimate 10.0.0 (Q2 2020) Release Notes

Overview

This document describes the changes and functionality available in Sugar Ultimate 10.0.0 (Q2 2020). Sugar 10.0.0 is available for both SugarCloud (Sugar-hosted SaaS) and On-Site deployments.

Customers who are upgrading to 10.0.0 (Q2 2020) from 9.3 (Winter '20) should refer to the following sections:

- [Feature Enhancements When Upgrading From 9.3 \(Winter '20\)](#)
- [Fixed Issues When Upgrading From 9.3 \(Winter '20\)](#)
- [Developer Notes for Upgrading From 9.3 \(Winter '20\)](#)
- [Known Issues](#)
- [Upgrade Paths](#)

Customers who are upgrading to 10.0.0 (Q2 2020) from 9.0.x (Spring '19) should refer to the following sections:

- [Feature Enhancements When Upgrading From 9.0.x \(Spring '19\)](#)
- [Fixed Issues When Upgrading From 9.0.x \(Spring '19\)](#)
- [Developer Notes for Upgrading From 9.0.x \(Spring '19\)](#)
- [Known Issues](#)
- [Upgrade Paths](#)

For information about this release's changes to existing functionality, please refer to the [What to Expect When Upgrading to 10.0](#) article.

Administrator and End User

Feature Enhancements When Upgrading From 9.3 (Winter '20)

The following feature enhancements are available in 10.0.0 (Q2 2020) when upgrading from the 9.3 (Winter '20) release:

Sugar Enterprise and Ultimate Features (9.3.x to 10.0.x)

For features included in other products for 10.0.x, please see the release notes for [Sugar Sell](#), [Sugar Serve](#), and [Sugar Professional](#).

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- [Edge browser support](#) : Sugar is now supported for use in the Edge browser.
 - [Cookie consent](#): The first time you log in, Sugar now asks you to consent to the use of cookies in the application.
 - **Record View Features**
 - [Field name placement](#): Users now have the option in their profile to configure where field names are placed in relation to their field values; the default is "Beside Field Values" and provides a more compact record view than the alternative layout, which shows labels "Above Field Values".
 - [Empty field pills](#) : Record view is now more compact with empty fields represented by a single empty field pill instead of a field name and a blank value.
 - **Viewing long record names** : Hovering over a truncated record name will now display the full text as a tooltip.
 - [Add revenue line items on lead conversion](#) : You can now add revenue line items to a new opportunity when converting a lead.
 - [Quick-create cases](#) : Users can now create cases from any page in Sugar using the Quick Create menu.
 - [Product Catalog](#) : The Product Catalog, Product Category, Product Types, and Manufacturers modules, which were previously admin-only, will be globally visible for all users on upgrade. Administrators can restrict user access to these modules via standard team and role restrictions. Audit Log functionality has also been added for the Product Catalog module.
 - **Reporting on Target Lists** : The Target Lists module is available to use in reports.
 - **Exporting Users reports** : Regular users can now export reports that target the Users module.
 - **Portal Help link** : A Help link to the portal user documentation has been added to the portal user menu.
 - **Dashboard and Dashlet Features**
 - [Dashboard limit](#) : The maximum number of dashboards that can be listed under the Home module tab has increased from 20 to 50 dashboards.
 - [Interactions dashlet](#) : A new dashlet is available for record views to see a list of calls, emails, meetings, and notes related to the record as well as to create new interactions.
 - [Comment Log dashlet](#) : A new dashlet is available for record views for viewing the Comment Log of a record and adding new entries.
 - [Record View dashlet](#) : A new dashlet is available for record views that shows a tabbed view of different records related to the current one you are viewing.
 - **Tile View Features**
 - [Leads Tile View](#) : Tile View is now available for the Leads module.
 - [Sticky filters](#) : A filter applied to the tile view will automatically apply to the module's list view and vice versa and will continue to

apply as you toggle between the Tile View tabs, switch between the list view and tile view, or navigate away from the module.

- [Custom field support](#) : Both stock and custom fields are now available to add to the Tile Options Header and Tile Options Body fields to be displayed in tile view.
- [Re-ordering column headers](#) : The left-to-right order of the tile view column headers can be changed in Tile View settings.
- **Field validation** : Field validation rules for records are now enforced when moving tiles from one column to another in tile view.
- **RTL support** : Tile View is now compatible with right-to-left (RTL) languages.
- **SugarBPM Features**
 - [Process sequencing](#) : It is now possible to assign a sequence for processes with the same target module running at the same time by using the Run Order field.
 - **Portal Name in email templates** : The Portal Name field on the Contacts module is now available in the Fields Selector tool when designing process email templates.
- **General Administration Features**
 - [Editing preview layouts](#) : Administrators can now edit the Preview View layout in Studio.
 - [Relate Fields Denormalization](#) : Administrators with very large database tables can optimize their database structure for faster sorting and data load on list view pages.
 - [Module Loader REST API](#): Nine new [REST API endpoints](#) have been added for performing actions in Module Loader including uploading, installing, and enabling packages.

Feature Enhancements When Upgrading From 9.0.x (Spring '19)

The following feature enhancements are new in version 10.0.0 (Q2 2020) when you are upgrading from the 9.0.x (Spring '19) release:

Sugar Enterprise and Ultimate Features (9.0.x to 10.0.x)

For features included in other products for 10.0.x, please see the release notes for [Sugar Sell](#), [Sugar Serve](#), and [Sugar Professional](#).

- [Edge browser support](#) : Sugar is now supported for use in the Edge browser.
- [Cookie consent](#) : The first time you log in, Sugar will ask you to consent to the use of cookies in the application.

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- [New Tile View](#) : For leads, cases, tasks, and opportunities, a new view has been added that displays records as tiles in an interactive, drag-and-drop interface.
 - [Product Catalog availability](#) : The Product Catalog, Product Category, Product Types, and Manufacturers modules, which were previously admin-only, will be globally visible for all users on upgrade. Administrators can restrict user access to these modules via standard team and role restrictions. Audit Log functionality has also been added for the Product Catalog module.
 - **Record View Features**
 - [Field name placement](#): Users now have the option in their profile to configure where field names are placed in relation to their field values; the default is "Beside Field Value" and provides a more compact record view than the alternative layout, which shows labels "Above Field Values".
 - [Empty field pills](#): Record view is now more compact with empty fields represented by a single empty field pill instead of a field name and a blank value.
 - **Viewing long record names** : Hovering over a truncated record name will now display the full text as a tooltip.
 - [Editing via subpanel preview](#) : Users now have the option to edit a record's fields when previewing the record from a related-records subpanel.
 - **Reporting on target lists** : The Target Lists module is available to use in reports.
 - **Exporting Users reports** : Regular users can now export reports that target the Users module.
 - [Email filters](#) : The Emails list view can now be filtered using the From, To, Cc, Bcc, and [Direction](#) fields.
 - [Quick-create cases](#): Users can now create cases from any page in Sugar using the Quick Create menu.
 - [Case resolution field](#) : The new Date Resolved field on the Cases module captures the date and time each case is resolved and automatically clears if the case is re-opened.
 - **New "Portal" option for Source fields** : The Source field on the [Cases](#) and [Bugs](#) modules now includes "Portal" as an option.
 - [Adding revenue line items on lead conversion](#) : You can now add revenue line items to a new opportunity when converting a lead.
 - **Negative currency amounts for revenue line items** : Support for negative "Likely" values, which can be used for credits or price adjustments, has been added to the Revenue Line Items module.
 - [Support for service products](#): Services and other duration-based products can now be added to the product catalog and added one-off as revenue line items and quoted line items.
 - **New fields for service products** : Several new service-related fields have been added to the Accounts, Opportunities, Revenue Line Items, Quoted Line Items, and Product Catalog modules

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- including Service (checkbox), Service Start/End Date, Service Duration, Renewable (checkbox), and Date of Next Renewal.
 - **Calculated end dates** : The service's end date on revenue line items and quoted line items is automatically calculated using the line item's start date and the duration taken from the product catalog.
 - **Quote PDF templates** : New quote and invoice templates containing service-related fields have been added to [PDF Manager](#) for the Quotes module. The templates are named "Quote (with services)" and "Invoice (with services)" and can be accessed from a Quote record's Actions menu.
 - **Dashboard and Dashlet Features**
 - [Dashboard limit](#) : The maximum number of dashboards that can be listed under the Home module tab has increased from 20 to 50 dashboards.
 - [Interactions dashlet](#) : A new dashlet is available for record views to see a list of calls, emails, meetings, and notes related to the record as well as to create new interactions.
 - [Comment Log dashlet](#) : A new dashlet is available for record views for viewing the Comment Log of a record and adding new entries.
 - [Record View dashlet](#) : A new dashlet is available for record views that shows a tabbed view of different records related to the current one you are viewing.
 - [Shared filters for List View dashlets](#) : Custom filters applied to List View dashlets are now shared with all members of the associated team(s) that have access to the shared dashboard.
 - [Comment Log Features](#)
 - URLs in Comment Log entries are now clickable and will open the link in a new tab.
 - Users can now insert a link to a Sugar record in the form of a clickable pill in Comment Log entries.
 - Users can now be tagged in Comment Log entries, which causes the tagged user to receive a notification in Sugar.
 - **SugarBPM Features**
 - [Process sequencing](#) : It is now possible to assign a sequence for processes with the same target module running at the same time by using the Run Order field.
 - **SugarBPM and emails**
 - The Portal Name field on the Contacts module is now available in the Fields Selector tool when designing process email templates.
 - The Emails module is now available as a target module when creating process definitions in SugarBPM.
 - A "From" user can now be configured in SugarBPM's [Send Message events](#) so that emails sent from processes have a more personalized sender.
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- Shared email accounts can now be used as the From address in emails sent using SugarBPM [Send Message](#) and End events.
 - **Portal Features**
 - **Records displayed in portal by default** : Cases, bugs, and notes created in Sugar will automatically be visible in the portal as the Show in Portal/Display in Portal checkbox is now enabled by default in the system.
 - **Contact creation via portal registration** : Portal registration submission now creates a new contact record in Sugar. The contact's Lead Source field is automatically set to "Support Portal User Registration" and the field "Portal User Company Name" has been added, which will display the name of the company the customer enters when signing up for the portal.
 - [Portal configuration options](#)
 - **Display/hide modules in navigation bar** : Administrators now have the ability to control which modules appear in the portal's navigation bar.
 - **Portal contact information** : The company's contact information (e.g. phone, email) can now be displayed for portal users requiring additional assistance logging into their account.
 - **Portal logo** : Administrators now have the ability to change the image that appears on the upper left of the portal screen by configuring the Logomark URL field.
 - **Sugar Portal's user-facing features** : Sugar Portal users now can [preview records](#), [reset their passwords](#), and choose their own username and password during [registration](#). A Help link to the portal user documentation has also been added to the portal user menu.
 - **General Administration Features**
 - [SugarCloud Insights](#) : The new SugarCloud Insights page allows administrators to easily monitor their instance's database and file system storage usage, license usage, as well as gain access to PHP error logs and access logs.
 - [Activity Stream Purger scheduler](#) : The Activity Stream Purger scheduler has been added and can be enabled to prune activity stream records that are older than 6 months from the activities table.
 - [User license type](#) : A new field on user records, "License Type", allows administrators to grant each user access to one or more products including SugarCRM's newest CRM offerings, Sugar Sell and Sugar Serve. Administrators can mass update the License Type field for users from the Users list view.
 - [Editing preview layouts](#) : Administrators can now edit the Preview View layout in Studio.

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- [Relate Fields Denormalization](#) : Administrators with very large database tables can optimize their database structure for faster sorting and data load on list view pages.
 - [Module Loader REST API](#): Nine new [REST API endpoints](#) have been added for performing actions in Module Loader including uploading, installing, and enabling packages.
 - **Managing employees** : SugarIdentity-enabled instances now support creating and editing non-user employee records.
 - **StartTLS for LDAP** : Sugar now supports StartTLS encryption for LDAP.

Fixed Issues When Upgrading From 9.3 (Winter '20)

The following issues are resolved in version 10.0.0 (Q2 2020) when upgrading from the 9.3 (Winter '20) release. [Case portal users](#) can use the following links for more details about each issue:

- [84156](#) : In certain circumstances, creating revenue line items may fail with an error.
- [83989](#) : An error may occur when using a process email template that contains a link to a related module if the record that triggered the process does not have a related record of that type.
- [83820](#) : When creating reports using the Product Categories module, generating the SQL queries may not display correctly when previewing the report.
- [83765](#) : Deleting a user from the Cloud Settings console may not delete the user record from the Sugar application as expected if the organization has exceeded its license limit.
- [83709](#) : Stock Change Timer reports in Sugar Serve that use averages perform incorrect average calculations.
- [83679](#) : Users may be unexpectedly logged out with an error when logged into a SugarIdentity-enabled instance with a non-English language (e.g. French) and the English (US) language is disabled in the system.
- [83564](#) : Sugar instances with a Sugar Serve-only license type may improperly prevent admin users from accessing the System Email Settings on the Admin page.
- [83277](#) : Sugar licenses that are not revalidated after a renewal or upgrade to version 9.1.0 may cause users and admins to not be able to access certain areas (modules, dashboards) of the Sugar application.
- [83225](#) : The filter(s) applied to the tile view is not preserved when toggling between the two group-by options (e.g. Opportunities by Time, Opportunities by Sales Stage) in the Opportunities tile view.
- [83111](#) : In certain circumstances, dependent dropdown fields may not populate correctly when creating new records.

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- [83056](#) : Custom dependencies in the Opportunities module may cause the Tile View to not display as expected.
 - [82897](#) : The dashboard metadata from a previous version of Sugar may not be compatible after upgrading to version 9.1.0 causing a 500 error to occur in certain circumstances.
 - [82850](#) : Dragging and dropping a tile to a column in tile view may not update the record as expected if the column's dropdown value contains a numeric value (e.g. 1) in the Item Name.
 - [82779](#) : In certain circumstances, downloading a PDF file via the module's record view (e.g. Accounts) may improperly generate multiple PDFs at once and result in PHP errors.
 - [82690](#) : When the forecasting worksheet's current (uncommitted) numbers are higher than the most recent commit, it may not be reflected correctly in the forecast's summary and commit history.
 - [82647](#) : Sorting on a relate field (e.g. Account Name) in the list view may improperly remove a record from the list view if the currently logged in user does not have access to view the related record due to team memberships.
 - [82589](#) : Setting the default date format in the admin's profile to "mm/dd/yyyy" may cause the time periods on the Forecasts Settings page to incorrectly display "Invalid date".
 - [82565](#) : The Product Catalog dashlet may not display the scrollbar as expected when accessing Sugar using Firefox.
 - [82455](#) : Quoted Line Items subpanels on record views of modules with no currency fields may not load as expected.
 - [81699](#) : Creating or linking a record via a subpanel (e.g. Notes) may improperly direct the user to the top of the record view instead of remaining in the current subpanel view.
 - [81221](#), [78536](#) : Users may experience an unexpected error when utilizing Sugar if the instance contains a large number of calculated fields.
 - [80752](#) : When changing a date field that is marked for "Audit", the audit log may show an incorrect old/new value for the field if the user's current time zone reflects a different date than UTC.
 - [80600](#), [74539](#) : The changes made to certain module's (e.g. Calls, Meetings) record view layouts in Admin > Studio may not be respected when previewing the record via the intelligence pane.
 - [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.
 - [79763](#) : The Account Name field does not get populated as expected for quoted line items related to a quote.
 - [79618](#) : In certain circumstances, users may experience performance issues when running reports in instances with a large dataset.
 - [78802](#) : Using REST API endpoints to filter on teams using \$equals may not return exact matches as expected.
 - [75154](#) : Sugar may improperly truncate long record names/subjects and not

display the full value in the field as expected.

- [73912](#) : Certain reports may not generate as expected if the last group-by field is a date (e.g. Opportunities > Month: Expected Close Date) and the report contains a chart (e.g. Horizontal Bar).
- [67886](#) : During the lead conversion process, creating a new opportunity record does not automatically get associated with the revenue line item (if enabled) causing issues completing the lead conversion.

Fixed Issues When Upgrading From 9.0.x (Spring '19)

The following issues are newly resolved in version 10.0.0 (Q2 2020) when upgrading from the 9.0.x (Spring '19) release. [Case portal users](#) can use the following links for more details about each issue:

- [84156](#) : In certain circumstances, creating revenue line items may fail with an error.
- [83989](#) : An error may occur when using a process email template that contains a link to a related module if the record that triggered the process does not have a related record of that type.
- [83820](#) : When creating reports using the Product Categories module, generating the SQL queries may not display correctly when previewing the report.
- [83765](#) : Deleting a user from the Cloud Settings console may not delete the user record from the Sugar application as expected if the organization has exceeded its license limit.
- [83709](#) : Stock Change Timer reports in Sugar Serve that use averages perform incorrect average calculations.
- [83679](#) : Users may be unexpectedly logged out with an error when logged into a SugarIdentity-enabled instance with a non-English language (e.g. French) and the English (US) language is disabled in the system.
- [83643](#) : When using Sugar on Chrome or Firefox on a Windows computer, reports may fail to export.
- [83564](#) : Sugar instances with a Sugar Serve-only license type may improperly prevent admin users from accessing the System Email Settings on the Admin page.
- [83528](#) : Advanced Workflow processes may not trigger as expected for records (e.g. cases) created via the Sugar Portal.
- [83495](#), [83483](#) : In certain circumstances, the Sugar Portal may fail to load or not behave as expected.
- [83413](#) : In certain circumstances, users may not have access to all the modules as defined by their assigned roles and experience unexpected issues.
- [83277](#) : Sugar licenses that are not revalidated after a renewal or upgrade

to version 9.1.0 may cause users and admins to not be able to access certain areas (modules, dashboards) of the Sugar application.

- [83225](#) : The filter(s) applied to the tile view is not preserved when toggling between the two group-by options (e.g. Opportunities by Time, Opportunities by Sales Stage) in the Opportunities tile view.
- [83218](#) : In certain circumstances, new users created in SugarIdentity via the Cloud Settings console may not sync to Sugar as expected.
- [83111](#) : In certain circumstances, dependent dropdown fields may not populate correctly when creating new records.
- [83056](#) : Custom dependencies in the Opportunities module may cause the Tile View to not display as expected.
- [83034](#) : Attempting to access the Tile View settings on the Admin page may not work as expected in Sugar Sell.
- [82939](#) : A new entry gets improperly added to the team_sets_modules table each time a record is saved in Sugar, causing the table to grow large and possibly result in unexpected issues.
- [82929](#) : When instances are upgraded to 9.1.0 around the same time their Sugar license is renewed, certain modules/functionality, including the Admin page may unexpectedly become inaccessible to users.
- [82897](#) : The dashboard metadata from a previous version of Sugar may not be compatible after upgrading to version 9.1.0 causing a 500 error to occur in certain circumstances.
- [82874](#), [82867](#) : Lead conversion may not work as expected in certain circumstances.
- [82850](#) : Dragging and dropping a tile to a column in tile view may not update the record as expected if the column's dropdown value contains a numeric value (e.g. 1) in the Item Name.
- [82848](#) : Employee records cannot be created for instances that use SugarIdentity.
- [82839](#) : In certain circumstances, the modules to which you have access to in Sugar may not appear as expected.
- [82797](#) : Modifying the license type of system administrator users may prevent other users from accessing functionality their license types should allow.
- [82779](#) : In certain circumstances, downloading a PDF file via the module's record view (e.g. Accounts) may improperly generate multiple PDFs at once and result in PHP errors.
- [82690](#) : When the forecasting worksheet's current (uncommitted) numbers are higher than the most recent commit, it may not be reflected correctly in the forecast's summary and commit history.
- [82682](#), [81111](#) : In certain circumstances, changing the email address on a user record may incorrectly update the email address for another user as well.
- [82647](#) : Sorting on a relate field (e.g. Account Name) in the list view may improperly remove a record from the list view if the currently logged in user does not have access to view the related record due to team

memberships.

- [82589](#) : Setting the default date format in the admin's profile to "mm/dd/yyyy" may cause the time periods on the Forecasts Settings page to incorrectly display "Invalid date".
- [82565](#) : The Product Catalog dashlet may not display the scrollbar as expected when accessing Sugar using Firefox.
- [82494](#) : The project's Gantt chart may not display as expected if the related project tasks are assigned to an individual (e.g. Sugar user) via the Resource field.
- [82475](#) : When saving a new quote record assigned to another user, the Assigned To field may incorrectly revert back to the current user who created the record.
- [82467](#) : Sugar instances may become inaccessible in certain circumstances due to a permission error.
- [82455](#) : Quoted Line Items subpanels on record views of modules with no currency fields may not load as expected.
- [82429](#) : Upgrading to Sugar 9.0.0 may revert the database field length for dropdown, radio, and image fields back to the default value which may result in an upgrade failure.
- [82320](#), [72745](#): In certain circumstances, the Check Inbound Mailboxes scheduler may fail to import inbound emails.
- [82301](#) : Testing the connection for Marketo connector may result in a PHP fatal error.
- [82280](#) : Delete action may cause database performance issues in certain situations.
- [82208](#) : Importing or uploading files may fail to work as expected.
- [82173](#) : User sessions that expire while accessing a Legacy module (e.g. studio) may cause the cross-site forgery error message to appear.
- [82044](#) : Saving an opportunity record will fail with an error if it contains negative values.
- [82039](#) : Global search may not work as expected when searching for text in the Description field that contains more than 32766 characters. To see the effects of this change, admins need to [re-index their instance](#).
- [81993](#) : In certain circumstances, performing full-text search re-indexes may cause performance issues.
- [81908](#) : Multiple edits to a record may cause redundant elastic search reindexes resulting in performance degradation.
- [81818](#) : If a user logs in to a Sugar instance configured with SAML via the standard login screen, an Invalid Credentials error may appear unexpectedly while utilizing Sugar.
- [81788](#) : Users may encounter unexpected behavior when uploading images in a record that contains more than one image-type field in the record view layout.
- [81733](#) : For certain report types, toggling the chart legend to remove a segment of the report chart may cause the report chart drill-through to not work as expected.

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- [81699](#) : Creating or linking a record via a subpanel (e.g. Notes) may improperly direct the user to the top of the record view instead of remaining in the current subpanel view.
 - [81693](#), [81003](#), [80736](#) : In certain circumstances, the Action element in a process definition may not preserve the configurations made in the Teams field as expected.
 - [81648](#) : When a report is grouped by an aggregate date field (e.g. Month: Test Date), clicking the segment of the report chart where the field is empty may cause the report chart drill-through to not work as expected and display a 500 error.
 - [81646](#) : Audit log entries generated from a SugarBPM process definition may display an incorrect source value.
 - [81568](#) : Field validation is not triggered when a decimal value is improperly entered into an integer field.
 - [81544](#) : When viewing additional details of an activity (e.g. meeting) via the calendar, the datetime format may not respect the system or user locale settings and incorrectly display the values using UTC.
 - [81400](#), [79294](#) : When the "Round Numbers Over 100000" option is enabled in the report's chart options, the value that appears when hovering on a segment of the report chart may not display correctly.
 - [81261](#) : Report chart drill-through may not work as expected if the report contains a date field formatted as "MM/DD/YYYY".
 - [81221](#), [78536](#) : Users may experience an unexpected error when utilizing Sugar if the instance contains a large number of calculated fields.
 - [81184](#) : Attempting to view the audit log may result in a 500 error if the record was imported with the Date-type field formatted as "MM/DD/YYYY".
 - [81014](#) : Attempting to drag and drop activities (e.g. calls, meetings, tasks) in the calendar may not work as expected if the calendar is set to the month view.
 - [80966](#) : Records with a custom calculated Datetime field may fail to save with an error if the calculation results in a null value.
 - [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.
 - [80752](#) : When changing a date field that is marked for "Audit", the audit log may show an incorrect old/new value for the field if the user's current time zone reflects a different date than UTC.
 - [80717](#) : Calculated fields containing a count() function may return incorrect results when used in conjunction with the approval process in a process definition.
 - [80698](#) : Calculated fields containing the rollupSum() function may improperly update and display incorrect values each time additional records are loaded in the related module subpanel, and attempting to navigate away from the current record may result in unexpected behavior.
 - [80676](#) : The SugarBPM process definition may not trigger as expected when

the condition for the Start event uses the "Changes from" operator.

- [80600](#), [74539](#) : The changes made to certain module's (e.g. Calls, Meetings) record view layouts in Admin > Studio may not be respected when previewing the record via the intelligence pane.
- [80543](#) : Calculated fields in the Quotes module containing a rollup function (e.g. rollupSum) do not get calculated until the quote record is saved.
- [80430](#) : SugarCloud sessions may time out with a 500 error due to a database issue.
- [80250](#) : Receive Message events configured for a record related to the process definition's target module may not behave as expected.
- [80021](#) : Clicking the Cube icon to view recently viewed records may result in a 500 error for Sugar instances with a large number of custom modules.
- [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.
- [79861](#), [70389](#), [65339](#) : Tabbing while inline editing the address block in the record view may not work as expected.
- [79767](#) : SugarBPM processes do not send email messages to contact recipients as expected.
- [79763](#) : The Account Name field does not get populated as expected for quoted line items related to a quote.
- [79618](#) : In certain circumstances, users may experience performance issues when running reports in instances with a large dataset.
- [79469](#), [79724](#) : 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.
- [79154](#) : Logic hooks using namespaces may be improperly deleted during an upgrade.
- [78802](#) : Using REST API endpoints to filter on teams using \$equals may not return exact matches as expected.
- [78229](#) : Downloading the import file template may take longer than expected for modules containing a large number of records.
- [77280](#) : Duplicate email addresses with different capitalizations (e.g. test@test.com, Test@test.com) are improperly allowed to be added to records resulting in adverse behaviors.
- [77141](#) : A user assigned a role with access to the Forecasts module disabled may not be able to create opportunity records.
- [75154](#) : Sugar may improperly truncate long record names/subjects and not display the full value in the field as expected.
- [74887](#) : When there are a large number of filters (greater than 20) created by the same user for a module (e.g. Accounts), the corresponding list view dashlet may not behave as expected.
- [74097](#) : Changing the instance's opportunity model from "Opportunities

and Revenue Line Items" to "Opportunities" may cause data to not display correctly when viewing the campaign's ROI.

- [73912](#) : Certain reports may not generate as expected if the last group-by field is a date (e.g. Opportunities > Month: Expected Close Date) and the report contains a chart (e.g. Horizontal Bar).
- [69957](#) : Large number of activity stream records may cause performance issues.
- [67886](#) : During the lead conversion process, creating a new opportunity record does not automatically get associated with the revenue line item (if enabled) causing issues completing the lead conversion.
- [66086](#) : Embedded images may not display properly in archived emails.

Known Issues

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

- [84236](#), [84076](#) : In certain circumstances, users may run into unexpected errors when trying to access certain modules and/or notice modules missing from the navigation bar.
- [84014](#) : When an opportunity's expected close date is updated from tile view, the Sales Stage and Expected Close Date fields are improperly updated on related revenue line items that are already closed.
- [83994](#) : In certain circumstances, campaign emails sent by regular users may not send as expected and result in unexpected errors. As a workaround, send the campaign as an Admin user or do not click the Delete Test Entries button when sending the campaign as a regular user.
- [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.
- [83839](#) : Changing a user's license type from Sugar Enterprise to Sugar Sell and/or Sugar Serve may cause the user to be unable to log into Sugar.
- [83715](#) : User assigned to the Service Console and/or Renewals Console does not have access to configure the console settings.
- [83574](#) : Editing contact records containing a duplicate portal name may result in a number of unexpected errors when saving the record.
- [83510](#) : In certain circumstances, PHP warning errors may occur for certain SugarCloud instances.
- [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.
- [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.

- [83301](#) : In certain circumstances, the tooltip (e.g. Create) may continue to persist improperly while navigating through Sugar. As a workaround, reloading the web browser will clear the tooltip from the screen.
- [83178](#) : When administrating Sugar Portal, enabling or disabling the "Enable search before opening a case" option does not update the user interface as expected. As a workaround, a Quick Repair and Rebuild must be run for the change to take effect.
- [83091](#) : Report chart drill-through may not work as expected and display incorrect data for users in different timezones.
- [82970](#) : Deactivating the default admin user (user id = '1') via the Cloud Settings console may not work as expected and the user's status incorrectly remains "Active" in Sugar.
- [82914](#) : Running reports in instances with a large number of team sets may fail to generate for non-admin users and result in performance issues.
- [82899](#) : Performing a recipient search using an email address does not return any records as expected for SugarBPM's Send Message events. As a workaround, manually enter in the full email address and press "Enter" or use the selection option to choose the recipient.
- [82840](#) : Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [82813](#), [81877](#) : Performing full-text search re-indexes from the command line or via Admin > Search may run out of memory when run on very large data sets.
- [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.
- [82693](#) : When importing contacts mapped to new accounts, users may experience unexpected behavior if the system detects an error on the file. As a workaround, import the new accounts into Sugar first then import the contacts.
- [82584](#) : Custom user fields and stock fields which do not appear in SugarIdentity cannot be imported in Sugar instances using SugarIdentity as the Import Users option is not available.
- [82581](#) : An unexpected error message may appear when attempting to import in a person-type module (e.g. Contacts, Leads) after upgrading to Sugar 9.0.0. Users can close the error message to proceed with the import.
- [82559](#) : Certain customizations in Sugar may cause the upgrade to fail.
- [82495](#) : Adding quoted line items to a quote incorrectly sends an assignment notification to the current user who created and is assigned to the record.
- [82493](#) : Users may be unable to send outbound emails if the "Allow users to use this account for outgoing email" option is disabled via Admin > System Email Settings.

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- [82486](#) : Upgrades may fail when a custom field has conflicting field types defined.
 - [82484](#) : Attempting to undo an import may not work as expected and fail for modules containing custom fields.
 - [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 defect's description on the bug portal to convert the decimal fields.
 - [82454](#) : Entering duplicate email addresses with different capitalizations (e.g. test@here.com, Test@here.com) into a record (e.g. Contacts) may result in adverse behaviors.
 - [82451](#) : Removing the currency field from the Quotes record view layout may cause an unexpected error when viewing a quote and the Unit Price field to display blank for the quoted line items.
 - [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.
 - [82384](#) : Deleting note records created from email attachments may not work as expected and continue to persist in the upload directory.
 - [82377](#) : SugarBPM module field evaluations improperly allow the selection of the "changes", "changes to", and "changes from" operators when "All Related Records" is enabled. To avoid unexpected behavior, utilize the "is", "is not", or other non-change operators when evaluating all related records in process criteria.
 - [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.
 - [82254](#) : Emails may fail to send as expected if it uses an email template containing an attachment that is already attached to an existing note record. As a workaround, add the code described in the defect's description or delete the existing email template and create a new one with a fresh upload of the file attachment.
 - [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.
 - [82038](#) : Clicking on a Home page tab (e.g. Sales) or attempting to sort by a field column on the Legacy dashboard may not work as expected and result in an error.
 - [81999](#) : Users may be unexpectedly logged out when requests with out-of-date user_hash data are sent to the server in close succession.
 - [81929](#) : Report chart drill-through may not work as expected and display an error message (No data available) for reports using the Product Catalog module.
 - [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.
- [81335](#) : 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.
- [81328](#) : Changes made to custom relate fields that are marked as "Audit" in Admin > Studio do not get recorded in the audit log as expected.
- [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.
- [81152](#) : Event-based gateways improperly consider activity elements to be complete if the activity gets reassigned to another user via "Select New Process User".
- [81151](#) : Report chart drill-through may not work as expected when the report is filtered by a checkbox field.
- [81121](#) : In certain circumstances, the Gantt chart in the Projects module may display an incorrect year of "1907" for the date range if the date format in the user's profile or system locale settings is set to "MM/DD/YYYY". As a workaround, change the date format in the user's profile or system locale settings to "YYYY-MM-DD", "YYYY/MM/DD", or "YYYY.MM.DD".
- [81051](#): If a calculated Date field is set to null, the value is incorrectly displayed as an invalid date in reports.
- [81021](#) : Creating report schedules via duplication copies the related user recipient, preventing users from copying other users' report schedules for themselves.
- [80968](#): It may not be possible to disable SAML authentication via the user interface after certain actions have been performed on your Sugar instance.
- [80936](#): When importing records makes changes to an existing record, the Date Modified field is not updated.
- [80884](#): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message.
- [80865](#): It is not possible to search by the Record Name column in Process Management.
- [80799](#): Upgrading to Sugar 8.0.x may fail if you set the acl_actions table to MyISAM. As a workaround, set the acl_actions table to InnoDB before upgrading.

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- [80759](#): In PDF templates that contain more than one href link, only the first link works.
 - [80730](#) : Reports without charts are improperly available to select in the Saved Reports Chart dashlet.
 - [80726](#): Dropdown lists created in Module Builder incorrectly allow certain special characters in the item name; modules containing such a list cannot be deployed.
 - [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.
 - [80376](#): Uninstalling custom modules from Sugar may not delete the 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.
 - [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.
 - [79752](#) : When working with SugarBPM process business rules on Internet Explorer 11, you cannot delete columns from rules in the Rules Builder. As a workaround, please use another supported browser.
 - [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.

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- [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.
 - [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.
 - [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.
 - [78582](#) : Process definitions do not enforce the requirement that multiple paths must converge before an End event.
 - [78580](#) : Saving a record without completing the Salutation field which is marked as required in Admin > Studio may result in unexpected behavior.
 - [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 most recent changes will remain and any previous updates to module names will be incorrectly removed after save.
 - [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.
 - [78315](#) : The same Process ID may be used for multiple processes if a process definition's Start condition is triggered by simultaneous events.
 - [78128](#) : For dropdown list values, a value's Display Label will improperly revert to a blank value if its Item Name is 0 (zero).
 - [77780](#) : Instances using MS SQL may see unexpected behavior due to a lack of ORDER BY clause in the list view query.

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- [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.
 - [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.
 - [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
```

- [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.
- [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.
- [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

- [Developer Notes for Upgrading From Winter '20 \(9.3\)](#)
- [Developer Notes for Upgrading From Spring '19 \(9.0\)](#)

Developer Notes for Upgrading From 9.3 (Winter '20)

The following changes in this release may affect developers in version 10.0.0 (Q2 2020) when upgrading from the 9.3 (Winter '20) release:

- [Relate Fields Denormalization](#) : Administrators with very large database tables can optimize their database structure for faster sorting and data load on list view pages.
- **ExpressionEngine REST API endpoint update** : Currently, records with many SugarLogic related-value formulas can cause the URI to become too long using GET, causing a 414 error. Therefore, the existing GET endpoint for the ExpressionEngine's related-values API (/ExpressionEngine/:record/related) has been deprecated. It has been replaced with a POST endpoint of the same name. For more information and a sample request, please refer to the [Sugar 10.0 \(Q2 2020\) Customization Guide](#).
- **REST API** : The 10.0 (Q2 2020) Sugar release uses the [v11.8 REST API](#) version.
- **Module Loader REST API** : The following new REST Endpoints have been added for working with Module Loadable Packages. For complete details on parameters and usage guidelines, please refer to the [Sugar 10.0 \(Q2 2020\) Customization Guide](#).
 - /Administration/packages/:unFile
 - /Administration/packages/:id/disable/
 - /Administration/packages/:id/enable/
 - /Administration/packages/:file_install/install/
 - /Administration/packages/
 - /Administration/packages/installed/
 - /Administration/packages/staged/
 - /Administration/packages/:id/uninstall/
 - /Administration/packages

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- **LessJS theme variables** : The following theme-related LessJS variables have been removed in this release. For more information, refer to the [Adding Custom Color Variables to a Theme](#) SugarClub post.
 - @moss: #33800d;
 - @stone: #0f7799;
 - @cider: #7e6017;
 - @rose: #ebaaaa;
 - @cream: #fdf8ee;
 - @mint: #18e7d2;
 - @brightBlue: #1202f5;
 - **Performance improvement** : PHP Classes which extend SugarWidgetEnumField and override the `_get_column_select` method should now accept an optional `$shouldIfNull` parameter (bool) in order to avoid a PHP warning.
 - **labelsOnTop viewdef has been deprecated** : An option has been added to allow users to designate whether field labels in record views will appear beside the field or above the field. This could affect your customized layouts as it is per-user and therefore one user's record view may now differ from another's. Field label placement will be set to "Beside Field Value" by default for all users upon upgrade. This setting overrides labelsOnTop viewdef which is deprecated as of this release.
 - **Note:** Every user will see their preferred label placement regardless of ANY other settings because there is no code option to set this value. It can only be changed from the User's profile settings. To override this setting globally, a developer would need to create a custom record template using custom CSS to undo the side-label formatting.

Developer Notes for Upgrading From 9.0.x (Spring '19)

The following changes in this release may affect developers in version 10.0.0 (Q2 2020) when upgrading from the 9.0.x (Spring '19) release:

- **Sugar Sell Only**
 - **New fields** : Several new service-related fields have been added to the Accounts, Opportunities, Revenue Line Items, Quoted Line Items, and Product Catalog modules including Service (checkbox), Service Start/End Date, Service Duration, Renewable (checkbox), and Date of Next Renewal.
 - **Pipeline management** : The new fields in Sugar Sell are used to manage new features including calculated end dates, account renewal dates, and renewal pipeline automation. For more information on the new behavior, refer to the 9.3 release notes for Sugar Sell and the [Opportunities](#) documentation for Sugar Sell.

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- **Business hours between dates function** : For Business Centers (used in Sugar Sell and Sugar Serve), new internal functions have been added to calculate business hours elapsed between two dates and times. They both take in a start date and an end date parameter.
 - `getBusinessTimeBetween` : returns a decimal value representing the total time between the two given datetimes based on the business center's hours
 - `getHoursBetween` : returns an array with the results from both of these new functions
 - **Sugar Serve Only**
 - **Time to Resolution** : Two new fields have been added to the Cases module for Sugar Serve: `hours_to_resolution` and `business_hours_to_resolution`.
 - Type decimal (30 min will be 0.5 hrs)
 - Visible but read-only by default on record view
 - Available for list views but not shown by default
 - **Resolved Date automatic reset on case re-open** : In the Cases module, "Resolved Date" will automatically clear when the case status is changed from Closed, Rejected, or Duplicate to any other value.
 - There is a config setting `$clear_resolved_date` which can be overwritten in `config_override.php`.
 - By default, it is set to TRUE, meaning that the date will be cleared when the status changes from Closed, Rejected, or Duplicate to any other value.
 - If set to FALSE, then the date will not be cleared when the status is changed.
 - **First Response SLA Met/Not Met calculation** : Sugar Serve will auto-calculate the "First Response SLA Met" field once the field "First Response Sent" has been set to TRUE using any method.
 - We have included a step in the stock 9.3 SugarBPM template [Case Follow-Up Date Management](#) where the "First Response Sent" field is set to TRUE when the case's status changes from NEW to anything. Customers can decide to change this and make it based on other events (e.g. email or note sent). Whatever method customers decide to use as their first-response event, they need to set the "First Response Sent" field to TRUE.
 - Once the "First Response Sent" field is set to TRUE, all the fields are then evaluated by the bean. The system compares the targeted follow-up date/time vs. the first-response date/time and sets the field "First Response SLA Met" accordingly ("Yes" = SLA met or "No" = SLA not met).
 - The "First Response SLA Met" field may also be

automatically set to "No" via the stock 9.3 SugarBPM template [Case Follow-Up Date Management](#). There is a timer on the follow-up date as long as the case's Status = New. When the follow-up date/time passes, the field is set to NO.

- **Business hours between dates function** : For Business Centers (used in Sugar Sell and Sugar Serve), new internal functions have been added to calculate business hours elapsed between two dates and times. They both take in a start date and an end date parameter.
 - `getBusinessTimeBetween` : returns a decimal value representing the total time between the two given datetimes based on the business center's hours
 - `getHoursBetween` : returns an array with the results from both of these new functions
- **labelsOnTop viewdef has been deprecated** : An option has been added to allow users to designate whether field labels in record views will appear beside the field or above the field. This could affect your customized layouts as it is per-user and therefore one user's record view may now differ from another's. Field label placement will be set to "Beside Field Value" by default for all users upon upgrade. This setting overrides labelsOnTop viewdef which is deprecated as of this release.
 - **Note:** Every user will see their preferred label placement regardless of ANY other settings because there is no code option to set this value. It can only be changed from the User's profile settings. To override this setting globally, a developer would need to create a custom record template using custom CSS to undo the side-label formatting.
- [Activity Stream Purger job](#): Sugar now supports the automatic purging of old Activity Stream records in the database. This is implemented via a new Sugar Activity Stream Purger job.
 - **Note:** If you had previously installed the open-source SugarActivityStreamPurger module-loadable package, you will need to uninstall it prior to upgrading to 10.0.
- [Relate Fields Denormalization](#) : Administrators with very large database tables can optimize their database structure for faster sorting and data load on list view pages.
- **API Updates** : The 10.0 (Q2 2020) Sugar release uses the [v11.8 REST API](#) version.
 - It was previously Documented that all of the Activities REST APIs returned 401 Unauthorized when ActivityStreams was disabled. There has been a change such that the following three GET Requests will be returned with status: 200 OK and 0 records rather

than a 401 Exception:

- GET /<module>/Activities
- GET /<module>/:record/link/activities
- GET /<module>/:record/link/activities/filter
- New REST API endpoints were added to help for REST API version 11.5 and removed from help for REST API version 11.4. These endpoints are:
 - GET /<module>/recent-product
 - GET /<module>/favorites
- The following new REST APIs were added in v11.7:
 - /<module>/:record/link/related_activities : Will return related activity records for a specified record
- **Module Loader REST API** : The following new REST Endpoints have been added for working with Module Loadable Packages. For complete details on parameters and usage guidelines, please refer to the [Sugar 10.0 \(Q2 2020\) Customization Guide](#).
 - /Administration/packages/:unFile
 - /Administration/packages/:id/disable/
 - /Administration/packages/:id/enable/
 - /Administration/packages/:file_install/install/
 - /Administration/packages/
 - /Administration/packages/installed/
 - /Administration/packages/staged/
 - /Administration/packages/:id/uninstall/
 - /Administration/packages
- **ExpressionEngine REST API Endpoint Update** : Currently, records with many SugarLogic related-value formulas can cause the URI to become too long using GET, causing a 414 error. Therefore, the existing GET endpoint for the ExpressionEngine's related-values API (/ExpressionEngine/:record/related) has been deprecated and replaced with a POST endpoint of the same name. For more information and a sample request, please refer to the [Sugar 10.0 \(Q2 2020\) Customization Guide](#).
- **LessJS theme variables** : The following theme-related LessJS variables have been removed in this release. For more information, refer to the [Adding Custom Color Variables to a Theme](#) SugarClub post.
 - @moss: #33800d;
 - @stone: #0f7799;
 - @cider: #7e6017;
 - @rose: #ebaaaa;
 - @cream: #fdf8ee;
 - @mint: #18e7d2;
 - @brightBlue: #1202f5;
- **Performance Improvement** : PHP Classes which extend SugarWidgetEnumField and override the _get_column_select method

should now accept an optional `$shouldIfNull` parameter (bool) in order to avoid a PHP warning.

- **Feedback footer link** : The Feedback link has been deprecated and removed from the footer of the Sugar UI.
- **Portal changes** : The portal's user interface has undergone several changes:
 - The old portal `FilterView` and `PortalListTop` UI components were deprecated.
 - By default, record, preview, and list views in portal will no longer show the user who created, modified, or is assigned to a record (the date created and date modified will still be shown, just not who did the creating/modifying). Administrators can add these fields back via Admin > Sugar Portal > Layouts, but if they do so, the fields will not be hyperlinked.
 - A new field called "Portal User Company Name" has been added to the Contacts module. It will appear on the record view if portal is enabled. The field's database name is `portal_user_company_name`. It is a text field.
 - In portal, when creating a note or an attachment from the Cases record view, the modal dialog has been replaced with a drawer.
 - Portal users are now able to use Preview to view records to which they have access. The fields available for preview display can be controlled with portal configuration.
 - For new installs and upgrades "Display in portal" will be enabled by default for cases, notes, and bugs. Admins can disable the default setting in Studio field-level configuration.
 - It is now possible to customize both the image that appears in the top left (where the Sugar logo used to be) and the one that appears on the login page. This configuration is available via Admin > Sugar Portal > Configure Portal. The config option for this value is `logomarkURL`.
 - Administrators can now choose to enable a case-deflection feature for portal. The new config setting is called `caseDeflection` and is enabled by default. Any change to this value will require a Quick Repair and Rebuild.
 - Quick Create and Global Search were both removed from the portal header.
 - The portal footer was deleted entirely, including the Tour and Support links.
 - `View.Views.Portal.FooterActionsView` is deprecated as of 9.2 and may be removed in 10.2 and later.
 - A new field called with the database name `entry_source` has been added to the Contacts module. Possible values for the new field are `internal` or `external`. New portal contacts are automatically set as `external`. The field is neither viewable nor editable by portal users.
 - A new dropdown option has been added to the Source field used on

Bugs and Cases: "Portal". This means that the record in question originated from the Sugar portal. When a case (but not a bug) is created from the portal, this source field is automatically set.

- Portal signups will no longer create lead records by default. They will create contact records.
- New portal contacts are required to provide a last name, a unique username, email address, and password. They may provide a first name and a "Company Name". Company Name is a new field that hints at which Account record the Contact should be related to, but it is just raw text and does not automatically create any relationships.
- It is possible for the Admin to configure which modules are shown in the megamenu for portal users. This can be done via Admin > Sugar Portal > Configure Portal. By default, this list contains the Cases and Knowledge Base modules, in that order. The Bugs module can also be added. Removing a module from the megamenu does not make it inaccessible to portal users; they can still visit it if it is a portal-enabled module and they know the URL.
- It is now possible to customize metadata for portal by way of the custom directory. The method is exactly the same as for customizing the base app, but you will have to change "base" in file paths and viewdef definitions to "portal". If you create metadata for a non-portal module, you will be able to further customize it through Admin > Studio > Sugar Portal > Layouts.
- The portal list view now has a filter. If a filter had already been added to the portal list view via customization, the view will now show both. Therefore, the custom filter would need to be removed.
- It is no longer possible to view Personally Identifiable Information (PII) from the portal's user profile screen. Viewing PII of a Contact (or Lead, or Account, etc.) in the main app remains possible and nothing has changed in this regard.
- Administrators can specify one or more contact methods for customers trying and failing to reset their portal passwords to get in touch with a portal administrator. The options are a phone number, an email address, and an arbitrary URL. It is required to have at least one of these values set.
- **Searchable text limits** : Previously, only the first 32,677 characters of large text fields were searchable. This limit has been removed. Note this change may not be noticeable until a full re-index is completed.
- **Bootstrap updates** : Various aspects of the Bootstrap library have been updated in 9.2.0:
 - affix: 3.4.1
 - alert: 3.4.1
 - button: 3.4.1 (and also partially forked)
 - carousel: 3.4.1
 - collapse: FORKED, remains at 2.2.1

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- dropdown: FORKED, remains at 3.0.0
 - modal: 3.4.1
 - popover: 3.4.1
 - scrollspy: 3.4.1
 - tab: 3.4.1
 - tooltip: 3.4.1
 - transition: 3.4.1
 - View.Views.Base.AlertView#close has been deprecated in 9.2.0. Its functionality was subsumed by dispose().
 - jQuery was upgraded to version 3.4.1 and jQuery Migrate was upgraded to version 3.1.0.
 - Moment.js was upgraded to 2.24.0. We do not expect any backward-compatibility concerns as a result of this upgrade.
 - Sugar 9.1 introduced a new access-control framework for Sugar that determines what features a user gets access to based on the user's license type. The files used with this framework (ex. access_control.json) comprise critical control software and should not be modified.
 - There is a new license_type field on user records that determines what product the user is using and, therefore, which features they are entitled to access.
 - Sugar users may be associated with one or more product licenses via the User Management screen or API.
 - Sugar 9.1 introduced a new VisualPipeline Sidecar module.
 - Single-Spa v4.3.4 was added to Sugar Core in 9.1.0 (<https://single-spa.js.org>).
 - Handlebars version 1.3.1-sugarcrm-temporary is updated to remedy the Prototype Pollution security vulnerability.
 - HTML Purifier library is being upgraded to version 4.10
 - Micro frontend view is added as a tab to the right-hand side panel.
 - While back-end validation already existed for integer-type fields, there was no feedback in the user interface. Front-end validation has been added so the user will know when invalid data has been entered prior to saving the record.
 - The hide_admin_backup configuration option is no longer relevant.
 - Code related to out-of-date DB full-text search has been removed in this Sugar release. Sugar developers should leverage Elasticsearch-based global search APIs and functionality instead.
 - SugarAutoLoader has been refactored to better integrate with Composer's autoloader. This reduces the size of the SugarAutoLoader class map. This will also allow Sugar application entry points to be bootstrapped in a more conventional way.
 - For example: require_once __DIR__ . '/../vendor/autoload.php';
 - For on-site Sugar releases, the "Backups" option in the Sugar Administration panel has been removed. Please follow instructions from the [Cloning a Sugar Instance for Testing](#) article for steps to perform a full backup of Sugar filesystem and database.

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- When importing audited date fields, Sugar will now store that data in a consistent format within the audit tables. Existing dates in the audit log would have used the format of the user that did the original import.
 - Existing date information when displayed in the audit log will use the format that was stored in the database and not necessarily match the current user's preferred date format.
 - Newly imported dates viewed in the audit log should display the current user's preferred date format.
 - The following files have been added:
 - `sugarcrm/modules/Opportunities/upgrade/scripts/post/6_OpportunityFixSalesStageFieldDefinition.php` is added for upgrades to 9.1.0 to fix the `sales_stage` field. The upgrade script only runs for customers that are ENT flavor and use Opps + RLI. For versions prior to 9.1.0, the `sales_stage` field is hidden for instances that have Opps + RLI turned on. The script updates the field definition and makes the field a calculated field based on a new SugarExpression.
 - `sugarcrm/modules/Opportunities/upgrade/scripts/post/7_OpportunityUpdateSalesStageFieldData.php` is an upgrade script that will update the `sales_stage` field based on the rules listed above. This script only runs for ENT customers that have Opps + RLI turned on
 - `sugarcrm/modules/Opportunities/clients/base/api/OpportunitiesApi.php` file was added along with the put endpoint. If an Opportunity has a change to `sales_stage` and/or `date_closed` on an update, then all RLIs are updated to the Opportunity's `sales_stage` and/or `date_closed`. This is only available for ENT customers that have Opps + RLI turned on.
 - `sugarcrm/modules/VisualPipeline/upgrade/scripts/post/2_VisualPipelineAddDefaultConfigs.php` upgrade script adds the visual pipeline default configuration data. This script only runs for ENT customers and versions prior to 9.1.0.
 - `sugarcrm/include/Expressions/Expression/String/OpportunitySalesStageExpression.php` A new sugar expression was added to calculate the rollup of RLIs for an opportunity based on the rules listed above.
 - A new direction enum field has been added to the Emails module. This field is used to track the audience for the given email. For example, emails sent by your organization's employees to customers should be marked as Outbound while emails sent by customers to your organization's employees should be considered Inbound. Sugar will set this field automatically for an archived Email record depending on the related EmailParticipants.
 - More robust error handling was added to the Inbound Email Scheduler so that problematic messages (e.g. long header) will not stop other processing.
 - The following default SugarConfig options have been added that are used to configure the job's behavior. See the [Sugar Developer Guide](#) for more details on these settings.
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- `$sugar_config['activitystreamcleaner']['keep_all_relationships_activities'] = false;`
- `$sugar_config['activitystreamcleaner']['months_to_keep'] = 6;`
- The following PHP classes have changed their inheritance hierarchy:
 - `\Bug` now extends `\Issue` instead of `\SugarBean`
 - `\aCase` now extends `\Issue` instead of `\Basic`
- **Changes for Gmail to allow users to enable less secure apps** : Note that when customers want to use Gmail or G Suite as Sugar's outbound email, they are blocked by default. Google requires users to either enable two-factor authentication and use an app-specific password or to enable less-secure apps. It appears that Gmail wants applications to implement their OAuth 2 authentication to use their SMTP without enabling less secure apps. On October 30, 2019, Google began removing the setting to "Enforce access to less secure apps for all users." See this article for details: <https://gsuiteupdates.googleblog.com/2019/07/limit-access-LSA.html>. While no changes to Sugar have been made for this issue, it is important for developers to be aware.

Supported Platforms

For information on supported platform components, see [Sugar 10.0.x Supported Platforms](#).

Upgrade Paths

Sugar Ultimate and Sugar Enterprise Upgrade Paths

Package	From Version(s)	MySQL	SQLServer	DB2	Oracle
New Installs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.0.2-to-10.0.0	9.0.2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.3.0-to-10.0.0	9.3.0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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