
Sugar Ultimate 8.2.0 Release Notes

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Overview

This document describes the changes and functionality available in Sugar Ultimate 8.2.0. For more information on the changes in this release, please refer to the [What to Expect When Upgrading to 8.2](#) article.

Sugar 8.2.0 is only available for SugarCloud (Sugar-hosted SaaS) deployments.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in this release:

- [Quotes configuration](#) : Administrators can configure the available fields and their order for quotes worksheets when users work with quotes.
- [Grouped bar charts for reports](#) : In addition to the familiar stacked-style horizontal and vertical bar charts in Sugar, users may now select grouped bar charts as a new option for visualizing reports.
- [One-to-many Advanced Workflow message recipients](#) : The recipient list for Advanced Workflow process email templates may include email addresses from any module related to the target record as well as recipients related to the related modules.
- [Revenue line items in preferred currencies](#) : Users now have the ability to add revenue line items from the product catalog using their preferred currency instead of the product catalog item's currency by enabling the Create Revenue Line Items in Preferred Currency option in their user profile.

Fixed Issues

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

- [81351](#) : Health check errantly reports iNetMiniETL version 1.7.0 as incompatible.
- [81327](#) : PHP warning messages regarding Redis connection failures are errantly being written to the apache error logs.
- [81301](#) : Upgrades may be non-performant or fail when the instance

includes a large number of emails and attachments.

- [81171](#) : Upgrades may not complete when the instance includes long database table names.
- [81114](#) : Editing a record in the Preview panel to set a related record causes the relationship to be formed twice.
- [80879](#) : When in-line editing from a list view, calculated date fields based on related date fields may prevent the record from being saved.
- [80864](#) : The link to a lead's related opportunity is blank on the lead-conversion confirmation screen.
- [80854](#) : When adding quoted line items using the Product Catalog Dashlet, customizations making use of the Products product_template_namepopulate_list vardef are not respected.
- [80806](#) : Reports filtering on date fields using single digits for the months or days position may fail to return results.
- [80783](#) : Attachments to knowledge base articles created prior to version 8.0.0 may not appear in Sugar after upgrading to 8.x.
- [80541](#) : After a process definition updates a text field containing a line break, the html tag
 is displayed in place of the line break.
- [80414](#) : Reports displaying a relate-type field may incorrectly exclude records with a deleted record selected in their relate-type field.
- [80308](#), [78570](#), [78509](#), [78507](#), [76151](#) : When accessing Sugar using Internet Explorer or Firefox, attempting to clear a saved filter from the list view or subpanel search may not work as expected.
- [80049](#) : Health check incorrectly flags versions 1.01 and higher of the DrillDownReportsChart package as incompatible.
- [79994](#) : Custom field values belonging to deleted records are not removed from the database as expected by the Prune Database on 1st of Month scheduler job.
- [79917](#) : Health check incorrectly flags versions 1.31 and higher of the wGuage package as incompatible.
- [79782](#) : Health check incorrectly flags versions 4.5 and higher of the Process Manager package as incompatible.
- [79002](#) : List view date filters using the "Is Between" operator may cause overlapping labels when resizing the browser window.
- [78574](#) : Incorrect vardef default values may cause issues in Advanced Workflow functionality.
- [78540](#) : Emails may be incorrectly sent from disabled Advanced Workflow process definitions.
- [78668](#) : In certain circumstances, tooltips may persist improperly while navigating through Sugar.
- [78093](#) : Datetime filters on reports may not return the expected results depending on the user's time zone.
- [78089](#) : Health check incorrectly considers the "Timeline Dashlet Activities by CARRENET with license validation" package as compatible.
- [78087](#) : Health check incorrectly considers versions prior to 4.0 of the "Act-On Integrated Marketing Automation for SugarCRM version 7.x" package

as compatible.

- [75784](#) : Health check incorrectly considers Zendesk packages prior to version 2.20 as compatible.
- [74912](#) : In the Process Business Rules module, it is possible to create a business rule that exceeds the maximum SQL query length, resulting in a Javascript error and blank screen on save.
- [73696](#) : Users attempting to navigate elsewhere after exporting from Legacy modules are instead redirected to the Home page.
- [73306](#) : If the default list view filter for a module has been customized, the filter is also applied to its subpanels.
- [72600](#) : When viewing a dashlet containing a matrix report's chart, the total incorrectly shows as 0 when displayed in a user-preferred currency other than the currency of the underlying records.
- [70388](#) : When building a report, searching for available fields only returns the first ten matching field names.
- [66972](#) : When sorting report results by a date or datetime field belonging to a related module, selected runtime filters may not be applied.

Known Issues

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

- [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.
- [80834](#) : Line charts may not render correctly when viewing report records in the Chrome browser.
- [80829](#) : Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [80785](#) : Global search results may not display as expected on Microsoft Edge and Internet Explorer browsers. As a workaround, use Chrome or Firefox to access Sugar when possible.
- [80730](#) : Reports without charts are improperly available to select in the Saved Reports Chart dashlet.
- [80681](#) : Making changes to a report's relationship-based filters may result in an error when running the report. As a workaround, re-create the report with the desired filter without making any changes to it.
- [80583](#) : Attempting to erase fields (e.g. Description) marked as "Personal Information" from the Opportunities module do not work as expected and result in a 500 error.
- [80430](#) : On-Demand sessions may time out with a 500 error due to a

database issue.

- [80376](#): Uninstalling custom modules from Sugar may not delete the associated workflows as expected. As a workaround, remove the affected workflow via the database.
- [80250](#) : Receive Message events configured for a record related to the process definition's target module may not behave as expected.
- [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 Advanced Workflow may display HTML formatting when records are created using SOAP/REST v4.1. It is recommended to use the latest version of the API.
- [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.
- [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)).
- [79919](#) : Having multiple Advanced Workflow wait events in flight for a single record may cause subpanels to display duplicate entries for that record.
- [79777](#) : The billing address and shipping address for quotes created via the "Quotes (Bill To)" or "Quotes (Ship To)" subpanel may appear incorrectly if the related record's (e.g. Accounts) billing and shipping address is different.
- [79767](#) : Advanced Workflow processes do not send email messages to contact recipients as expected. As a workaround, manually type the contact's email address in the Send Message event's recipient field and press "Enter".
- [79763](#) : The Account Name field does not get populated as expected for quoted line items related to a quote.
- [79752](#) : When using Internet Explorer 11 with Advanced Workflows, columns cannot be deleted from process business 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.
- [79492](#) : Setting the log level to "Error" may result in multiple relationship errors being written to the log file.
- [79469](#) : When a web-to-lead form is created without including a redirect URL, the visitor may improperly get directed to an error page upon submitting the form.
- [79458](#) : Subpanels for related legacy modules may not display for the Quotes record view as expected.
- [79344](#) : The quoted line item total may not respect the user's preferred currency as expected.
- [79318](#) : When a user has team-based permissions enabled for their default team (i.e. "Additional Permissions Enabled"), the setting may not be respected when creating a new record.
- [79243](#) : Attachments on knowledge base records may not be visible on record view despite having been successfully uploaded.
- [79173](#) : When attempting to navigate away from the module or save the record, the Unsaved changes warning message may unexpectedly appear for modules containing custom dependent fields.
- [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](#) : An Advanced Workflow process may be prematurely considered complete when part of the process remains unexecuted in job queue.
- [78736](#) : Out-of-the-box dashboards may incorrectly be recreated after deleting it from the home page or intelligence pane.
- [78719](#) : Users may encounter an unexpected behavior when accessing Sugar if the Date Modified field in the user account contains the same value as another user.
- [78709](#) : Users assigned a role with Delete, Edit, or Export permission set to

"Owner" may improperly be restricted from downloading and emailing PDFs.

- [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.
- [78471](#): Setting the default date format in the user's profile to "mm/dd/yyyy" may cause the time periods on the Forecasts Settings page to incorrectly display "Invalid date".
- [78334](#): Performing certain actions in records containing calculated fields with rollup functions (e.g. rollupSum) and a large number of related records may cause performance issues in Sugar.
- [78315](#): The same Process ID may be used for multiple processes if a process definition's Start condition is triggered by simultaneous events.
- [78229](#): Downloading the import file template may take longer than expected for module's containing a large number of records.
- [78128](#): For dropdown list values, a value's Display Label will improperly revert to a blank value if its Item Name is 0 (zero).
- [78065](#): Moving a stock field between the columns (e.g. Hidden, Available) for the List View and Subpanel layouts in Studio may result in unexpected behavior.
- [77820](#): The Visibility Editor window may not load as expected and display an error if there is a large number of dropdown dependencies defined in the visibility editor.
- [77780](#): Instances using MS SQL may see unexpected behavior due to a lack of ORDER BY clause in the list view query.
- [77738](#): Attempting to merge two records (e.g. accounts) may fail with an error if the record that is being merged to the primary record contains a large number of related records (e.g. contacts).
- [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.
- [77601](#): Advanced Workflow cannot add related records when the target

module is on the "one" side of a one-to-many relationship.

- [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"
```

- [74539](#) : Custom fields may not display as expected when previewing call and meeting records via the intelligence pane.
- [74416](#) : Creating a Summation-type report that is grouped and sorted by a certain field (e.g. Month: Expected Close Date, Quarter: Expected Close Date) in a related module (e.g. Opportunities) may cause the run-time filter to not work as expected.

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- [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
```

- [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.
- [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.
- [70024](#) : Scheduled reports may have incorrect or missing charts in the emailed PDF. Select "Print as PDF" from the report's Actions menu to see

the updated chart.

- [69957](#) : Large number of activity stream records may cause performance issues.
- [68985](#) : Custom relationships created between a module and the Activities module via Admin > Studio cannot be deleted as expected.
- [68975](#) : Changing the order of subpanels via Admin > Display Modules and Subpanels does not preserve the order upon save.
- [68461](#) : Searching by non-primary email addresses in the module's list view (e.g. Accounts) does not pull up results as expected.
- [68112](#) : Matrix-type reports display incorrectly when exported to PDF.
- [67886](#) : During lead conversion, the newly created opportunity record does not get associated to the Revenue Line Item, causing the lead conversion to not complete successfully. As a workaround, create the opportunity record during lead conversion then manually associate the opportunity to the Revenue Line Item.

Developer

The following changes in this release may affect developers:

- With enforced user subscription limits, SAML and LDAP JIT user provisioning will not allow a customer to accidentally exceed the number of allowed active users.
- We have improved our support of [OAuth 2.0 standards](#) by adding support for [RFC 6750 bearer tokens](#). See [this blog post](#) for more details.
- The unsupported browser error message functionality has been removed from the login page. As part of this work, code related to this functionality was removed from `./clients/base/views/login/login.js`, and `LBL_ALERT_BROWSER_SUPPORT` and `TPL_ALERT_BROWSER_SUPPORT` were removed from `./include/language/en_us.lang.php`. We recommend testing that any customizations you made to the login page continue to work as expected and that your customizations are not using the strings `LBL_ALERT_BROWSER_SUPPORT` or `TPL_ALERT_BROWSER_SUPPORT`.
- Underscore 1.9.0 includes big performance improvements that we want you to benefit from, so we have upgraded Underscore from 1.8.3 to 1.9.1. No functionality will be deprecated as part of this upgrade, so we expect the impact to be quite low. See the [Underscore changelog](#) for more details.
- We have changed how default filters populate the filters in subpanels. Prior to this release, if you had customized the default filter for a module (see [this blog post](#) for more details on how you can implement this customization), that filter would be set as the default for subpanels in the module as well. Some users found this confusing as they assumed they were seeing all records instead of a filtered set of records in the subpanel.

We have updated this functionality so that even if you customize the default filter for a module, the subpanels in that module will still default to the All Records filter. If you have customized the default filter for a module, we recommend notifying your end users of this change in behavior.

- Ventana's [buildFileURL\(\)](#) method no longer supports the passOAuthToken option. Two functions in Sugar have been updated to no longer support the oauth_token option:
uploadFile() in /clients/base/fields/attachments/attachment.js
importProject() in /modules/pmse_Project/clients/base/views/project-import/project-import.js
- Handlebars v4 included significant changes to depthed paths that would likely break many customizations and integrations (see the [Handlebars 4.0.0 Release Notes](#) for more details). In order to get you the improvements without breaking your customizations and integrations, we have created a forked version of Handlebars v1.3.0 with a unique version number, 1.3.1-sugarcrm-temporary. The forked version of Handlebars is intended to be a temporary fork that we intend to discontinue using and/or remove in a future version of Sugar. Given the breaking changes to depthed paths in v4, we are exploring alternatives to reduce disruption to existing customizations and allow developers as much time as possible to adapt.
- jQuery has been upgraded from 1.11.3 to 1.12.4.
jQuery Migrate has been upgraded from 1.2.1 to 1.4.1.
jQuery UI has been upgraded from 1.11.4 to 1.12.1.
See [this blog post](#) for more details on how we expect these upgrades to affect your integrations and customizations as well as links to changelogs and release notes for these upgrades.
- We have created a new field component for Quotes configuration: Tristate Checkbox. The code for this checkbox is located in ./clients/base/fields/tristate-checkbox. The Tristate Checkbox has three possible states instead of the two a traditional checkbox has. The checkbox can be checked, unchecked, or indeterminate. The Tristate Checkbox was created specifically for use in the Quotes configuration interface and we do not recommend using it in other locations.
- Admins can now configure the Quotes user interface by navigating to Administration > Quotes Configuration. Ensure any fields that your code customizations rely on are visible or included in a SugarLogic formula for a visible, calculated field.
- Two new REST API endpoints were added to REST API version 11.3 to aid in configuring and retrieving the Quotes configuration:
POST /Quotes/config
GET /Quotes/config

Supported Platforms

For information on supported platform components, see [Sugar 8.2.x Supported Platforms](#).

Upgrade Paths

| Package | From Version(s) | MySQL |
|------------------|-----------------|-------|
| New Installs | | □ |
| 7.9.4.0-to-8.2.0 | 7.9.4.0 | □ |
| 8.0.1-to-8.2.0 | 8.0.1 | □ |
| 8.1.0-to-8.2.0 | 8.1.0 | □ |

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