
Sugar Professional 10.2.0 (Q4 2020) Release Notes

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Sugar Professional 10.2.0 (Q4 2020) Release Notes

Overview

This document describes the changes and functionality available in Sugar Professional 10.2.0 (Q4 2020). Sugar 10.2.0 is only available for SugarCloud (Sugar-hosted SaaS) deployments.

For information about this release's changes to existing functionality, please refer to the [What to Expect When Upgrading to 10.2](#) article.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in Sugar Professional 10.2.0 (Q4 2020):

Dashboard and User Interface Enhancements

- **Flexible dashboards**
 - [Resizable dashlets](#) : Dashlets can now be resized independently of other dashlets by clicking and dragging their lower corners.
 - [Unlimited dashlets](#) : Dashboards can now be configured to include an unlimited number of dashlets.
- **Increased list view filter limit** : The default number of List View filters has been increased to 50.
- **Audit log for activities** : You can now enable Audit Log for the Calls, Meetings, and Tasks modules.
- **Descriptive logic hook audit logs** : Audit log entries generated by a change made via logic hook now show the name of the specific logic hook, if provided, as the source.
- [Configurable subpanel columns](#) : You can now resize your subpanel column widths, having your changes preserved, and select which default fields you want to display in your subpanels by clicking the Gear icon.

Studio and Administration Enhancements

- **New Studio field types and options**
 - [AutoIncrement](#) : An auto-increment field type allows admins to add

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- a unique numerical ID to module records.
 - [Required If](#) : The administrator can make fields conditionally required.
 - [Sugar Logic updates](#)
 - **str_replace()** : This new formula lets you replace portions of text within a string.
 - **year()** : This new formula lets you return the year value from a date field.
 - **isInList()** : This updated formula now lets you pass a multiselect field as a second parameter.
 - **Email and connector security**
 - **OAuth2 for Google Mail and Exchange Online** : Sugar now supports OAuth2 connections to Google Mail and Exchange Online when configuring the [system outbound email](#), [system inbound email](#), and [user email accounts](#).
 - [Microsoft connector](#) : Administrators can configure the Microsoft connector via Admin > Connectors to allow Sugar to connect to the Microsoft API Services via OAuth2 to send outbound emails as well as receive inbound emails.

SugarIdentity Enhancements

- [Change Password capability for users](#) : The Change Password option is now available for SugarIdentity-enabled instances to allow users to change their password in Sugar.
- [Update existing user records via import](#) : SugarIdentity-enabled instances now support updating existing user records via import.
- [SugarCloud Settings link](#) : The SugarCloud Settings link is now available on the Admin page for administrators to easily access the SugarCloud Settings console.

Fixed Issues

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

- [85397](#) : For SugarIdentity-enabled instances using LDAP or SAML, the email address may not populate as expected for new users that are automatically created.
- [85201](#) : Instances with a large amount of data may experience 500 errors and performance issues when the Product Definitions Updates job is running.

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- [85100](#) : When a package fails to upload via Admin > Module Loader, the package scanner does not provide an output with information on why it failed.
 - [85083](#) : If the quote's worksheet column does not include the Account Name field, it may improperly cause a save action to trigger every time a user views a quote record resulting in undesired behaviors.
 - [85079](#) : In certain circumstances, the opportunity's Sales Stage field may incorrectly display the item name instead of the display label when the record view is in non-edit mode.
 - [84975](#) : Database updates that do not include an ID parameter are permitted without throwing a warning or error.
 - [84867](#) : Clicking the links in the RSS Feed dashlet or attempting to refresh the dashlet may not work as expected.
 - [84830](#) : Sugar icons may not display correctly for instances installed on "localhost" and accessed via the host IP address.
 - [84636](#) : In certain circumstances, the validation error that occurs when saving a record containing required dropdown fields that are incomplete in the layout may result in unexpected behaviors.
 - [84605](#) : Fillers added to Record View layouts in Studio are ignored and the fields below them are shifted upward.
 - [84575](#) : Fields (e.g. calculated fields) that are read-only appear editable in the module's record view if they do not contain any data.
 - [84522](#) : IFrame fields may not render as expected in Sugar 10.0.
 - [84374](#) : Applying a set visibility rule for the record view panel may cause the first field in a record view layout to become read-only during record creation.
 - [84216](#) : In certain circumstances, when creating a meeting, the start and end dates may not populate as expected when logged into Sugar with the Japanese language.
 - [84098](#) : When personal information fields are permanently erased on records (e.g. contacts) related to the data privacy record, an unexpected error may occur when viewing/accessing the record's (e.g. contacts) related call or meeting records.
 - [83624](#) : Matrix report may not display the sum of the currency field correctly when hovering over the chart.
 - [83535](#) : When configuring the outbound email account via Emails > Email Settings, Sugar improperly requires the email password to meet the password requirements defined in Admin > Password Management.
 - [83052](#) : Removing a manager from the user's Report To field may not remove the implicit relationship as expected and they will continue to improperly see records assigned to the user's private team.
 - [82979](#) : Health check improperly fails when it detects the Net-Results Marketing Automation plug-in.
 - [82284](#) : The Duration Minutes column for meetings and/or calls may display blank in reports for records containing a non-standard value (e.g. 50 mins) for the field.

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- [82274](#) : In certain circumstances, when multiple save events are triggered in the meeting/call record, the system may improperly send out duplicate invitations.
 - [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](#).
 - [81361](#) : Generating a report (e.g. Summation with Details) for the Opportunities module grouped by "Fiscal Quarter : Expected Close Date" may result in duplicate opportunity records appearing in the report result.
 - [81357](#) : Sugar instances configured to pull reports from a slave database may experience unexpected behaviors if the report query is slow and tries to reconnect.
 - [81289](#) : When a dependency definition using a SetValue parameter contains a related() function, clicking the Left and Right arrow button in the intelligence pane may not scroll through the records as expected.
 - [80623](#) : Web logic hooks may not work as expected when triggered by non-admin users.
 - [77402](#) : Uploading a package via Admin > Module Loader may not work as expected when using AWS S3 storage for uploads.
 - [71778](#) : The number of list view filters available to select are incorrectly dependent on the "Listview items per page" option in Admin > System Settings.
 - [70207](#) : Running a Quick Repair and Rebuild may fail with an error for fields where the Default Value contains an ampersand (&).

Known Issues

The following known issues are present in version 10.2.0 (Q4 2020). [Case Portal users](#) can use the following links for more details about each issue:

- [85613](#) : Record view fillers to the left of fields may shrink on smaller browser windows causing the right-column field to improperly move to the left column of the record view layout.
- [85435](#) : The subpanel column widths may not behave as expected in certain circumstances to display all the columns without having to use the scrollbar.
- [85368](#) : In certain circumstances, users may run into unexpected errors when trying to access certain modules and/or notice modules missing from the navigation bar.
- [85342](#) : When the Assignment Notification Emails template is customized using new variables (e.g. \$account_name), the email notification does not pull in the relevant information as expected and display the variables in plain text instead.
- [85331](#) : Performing certain administrative actions (e.g. performing Quick

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- Repair and Rebuild) may result in a 502 error for SugarCloud instances.
- [85323](#) : The body of the Knowledge Base record may not display in full width as expected.
 - [85301](#) : The 10.1 upgrade may create a `_overridesubpanel` file for custom module relationships to Opportunities, causing the record view to fail to load in the custom module. As a workaround, you can identify the `_overridesubpanel` file in the following file path of the affected module and delete it, then run a Quick Repair and Rebuild: `custom/Extension/modules/<custom_module>/Ext/clients/base/layouts/subpanels/_overridesubpanel...`
 - [85267](#) : Upgrading to 10.1.0 may fail for instances that have `upgrade_history` packages installed in a directory other than `upload/upgrades`.
 - [85234](#) : The Prune Database on 1st of Month scheduler job may fail with an error when executed in Sugar 10.x.
 - [85215](#) : Adding a custom MultiSelect field to the Users module's EditView layout may result in unexpected errors when editing and saving a user record.
 - [84909](#) : Hyperlinks are not clickable in text area fields for Legacy modules (e.g. Documents). As a workaround, add "https://" in the URL (e.g. `https://www.example.com`) for Legacy modules and the hyperlink will then be clickable.
 - [84884](#) : For SugarIdentity-enabled instances, employee records that are tied to a user record in the Cloud Settings console cannot be duplicated in Sugar.
 - [84808](#) : Sugar improperly allows custom fields to be created using the same name in different modules which causes errors when reindexing global search.
 - [84692](#) : Certain reports may not generate as expected if the last group-by field is a date (e.g. Opportunities > Week: Expected Close Date) and the report contains a chart (e.g. Horizontal Bar).
 - [84684](#) : In certain circumstances, saving the Preview View layout for modules (e.g. Accounts) via Admin > Studio may not work as expected and result in an error.
 - [84677](#) : In certain circumstances, the unsaved changes warning message may improperly display when users attempt to navigate away from the quote record.
 - [84666](#) : Upgrades may fail when a customization uses deprecated chart libraries.
 - [84582](#) : In certain circumstances, a blank space may appear in place of any dependent dropdown field(s) that are hidden in the record view layout if there is a filler next to the field(s). As a workaround, remove the filler next to the dependent dropdown field(s) in Admin > Studio.
 - [84551](#) : Legacy workflows created in Sugar Professional continue to remain active and trigger improperly after the customer migrates to Sugar Sell or Sugar Serve.
 - [84426](#) : The Meeting Type field in the Meetings module does not reflect

new values added to the Meeting Type dropdown list in Admin > Dropdown Editor.

- [84233](#) : Trying to click the records (e.g. calls) in the Planned Activities dashlet may not work as expected and a Download icon may improperly appear instead.
- [83997](#) : Adding additional panels/tabs or removing the Show More panel in the Record View Layout in Studio may cause the record view layout to display incorrectly. As a workaround, restore the default layout in Admin > Studio.
- [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.
- [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.
- [83433](#) : The total record count in the list view may not respect the user's team membership and incorrectly display the total count of records in the module instead of the total count of records that the user can see.
- [83425](#) : Custom Date fields in the PDF template may not respect the user's preferred date format.
- [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.
- [83091](#) : Report chart drill-through may not display the correct data for users in different timezones.
- [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.
- [82843](#) : Revalidating the license in Sugar may not work as expected and result in an error for customers using a proxy server.
- [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.

- [82767](#): Creating fields in Studio may not work as expected and result in an error if "Tracker Actions" is enabled in Admin > Tracker. As a workaround, disable "Tracker Actions" in Admin > Tracker.
- [82756](#) : Upgrades fail when a filter exists for a module that has been removed.
- [82742](#) : The Forecast Bar Chart Dashlet may not load as expected in shared dashboards.
- [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.
- [82559](#) : Certain customizations in Sugar may cause the upgrade to fail.
- [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.
- [82486](#) : Upgrades may fail when a custom field has conflicting field types defined.
- [82468](#) : Custom decimal fields may prevent upgrades from completing and result in invalid alter queries being generated. As a workaround, use the queries described in the 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.
- [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.

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- [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.
 - [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.
 - [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.
 - [80884](#): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message.
 - [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.

- [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.
- [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.
- [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.
- [78890](#) : Updating composer in instances with custom modules deployed from module builder may cause unexpected errors.
- [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.

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- [78600](#) : Special characters are improperly allowed to be entered in dropdown lists' item names.
 - [78580](#) : Saving a record without completing the Salutation field which is marked as required in Admin > Studio may result in unexpected behavior.
 - [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.
 - [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.
 - [77738](#) : Attempting to merge two records (e.g. accounts) may fail with an error if the record that is being merged to the primary record contains a large number of related records (e.g. contacts).
 - [77609](#) : Generating reports with empty relate fields may not include the associated record in the report result as expected if the related record has been deleted.
 - [77302](#) : Upgrades may fail due to queries posted by the upgrade exceeding the max_allowed_packet database setting.
 - [77287](#) : Performing certain actions (e.g. import, mass update) in Sugar may result in performance issues if there are numerous calculated fields to be updated in related records. As a workaround, add the following line to the config_override.php file to disable the related calculation field updates: `$sugar_config['disable_related_calc_fields'] = true;`. But keep in mind that the affected calculated values will not be updated and running Recalculate Values on related records.
 - [77249](#) : Guests may not get imported to call or meeting records as expected.
 - [77087](#) : When a record is assigned to the user's default private team, changing the Teams field from the private team to another team (e.g. Global) may incorrectly display the team name with the user's last name appended to the end (e.g. Global Smith).
 - [77055](#) : Attempting to mass update the user's outbound email client via Admin > User Management may not work as expected.
 - [76401](#) : The data in the report chart may be inconsistent between the report chart dashlet and the Reports module.
 - [75254](#) : Printing reports (e.g. Summation With Details report) to PDF may not work as expected when logged into Sugar via a mobile browser.
 - [74919](#) : Performing certain actions (e.g. Quick Repair and Rebuild) in Sugar that rebuild the cache files may cause unexpected issues in the

system if there are multiple users logged in and utilizing Sugar. As a workaround, perform such actions during off-hours where users are not utilizing the system.

- [74628](#) : Certain workflows using a Relate-type field in the condition may fail to load as expected and result in errors after upgrading to 7.6.x.x. As a workaround, run the following query in the instance's expressions table:

```
UPDATE expressions
SET     exp_type = "id"
WHERE   exp_type = "relate"
        AND lhs_field = "assigned_user_id"
```

- [74382](#) : The Case Summary dashlet may not work as expected and cause an internal server error if the account record has a large number of related cases.
- [74350](#) : An unexpected error may occur when saving a record if there is an issue with the user's default team in the database. As a workaround, run the following query in the instance's team sets table. The affected users will then need to edit their profile to configure their default teams again.

```
UPDATE team_sets
SET     deleted = 1
WHERE   id NOT IN ("select team_set_id from team_sets_teams where
        deleted = 0")
        AND deleted = 0
```

- [73566](#) : Calculated or dependent fields containing a related() function may not get calculated until after save for activity-type modules (e.g. Notes).
- [73468](#) : Time-elapse workflow may not trigger as expected when a date field (e.g. Expected Close Date) in the condition is set to a date in the future.
- [72810](#) : Filtering the list view search using custom checkbox fields may not work as expected.
- [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

Please refer to the [Developer Blog in the SugarClub community](#) for a summary of the changes in version 10.2.0 (Q4 2020) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 10.2.x Supported Platforms](#).

Upgrade Paths

Sugar Ultimate, Sugar Enterprise, and Sugar Professional Upgrade Paths

Package	From Version(s)	MySQL
New Installs		<input type="checkbox"/>
10.0.2-to-10.2.0	10.0.2	<input type="checkbox"/>
10.1.0-to-10.2.0	10.1.0	<input type="checkbox"/>

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