
Sugar Professional 11.0.0 (Q2 2021) Release Notes

Sugar Professional 11.0.0 (Q2 2021) Release Notes	3
Overview	3
Administrator and End User	3
Sales-Focused Enhancement	3
Email Template Enhancements	3
Studio and Administration Enhancements	3
Feature Enhancements When Upgrading From 10.0.x (Q2 2020)	4
Dashboard and User Interface Enhancements	4
Studio and Administration Enhancements	5
Sales-Focused Enhancements	6
Email Template Enhancements	7
Fixed Issues When Upgrading From 10.3 (Q1 2021)	7
Fixed Issues When Upgrading From 10.0.x (Q2 2020)	9
Known Issues	16
Developer	22
Supported Platforms	23
Upgrade Paths	23
Sugar Professional Upgrade Paths	23

Sugar Professional 11.0.0 (Q2 2021) Release Notes

Overview

This document describes the changes and functionality available in Sugar Professional 11.0.0 (Q2 2021). Sugar 11.0.0 is available for both SugarCloud (Sugar-hosted SaaS) and on-site deployments.

For information about this release's changes to existing functionality, please refer to the [What to Expect When Upgrading to 11.0](#) article.

Administrator and End User

Feature Enhancements When Upgrading From 10.3 (Q1 2021)

The following feature enhancements are new in Sugar Professional 11.0.0 (Q2 2021) when upgrading from the 10.3 (Q1 2021) release:

Sales-Focused Enhancement

- [Quote layout updates sync to Sugar Mobile](#): The Quote Worksheet layout in Sugar will now sync to the Quotes detail view in Sugar Mobile. For those upgrading to 11.0, the administrator must re-save the Quotes Configuration admin page for the layout to be applied in the mobile app.

Email Template Enhancements

- [Email Templates converted to Sidecar](#): The Email Templates module has been converted from the legacy user interface to the Sidecar interface.
- [Cases in Email Template Variables](#): The Cases module has been added to the available modules from which variables can be used in email templates.

Studio and Administration Enhancements

- [Content Security Policy Settings](#): To protect your instance, Sugar now prevents any external web content from loading in elements such as iframes and Web Page dashlets in your Sugar instance until the administrator adds the web domain as a trusted site in the new Content

Security Policy Settings.

- [Enable or disable notifications per API platform](#): Administrators can control whether users should receive assignment notifications when records are created via API on a per-platform basis via Admin > Configure API Platforms.

Feature Enhancements When Upgrading From 10.0.x (Q2 2020)

The following feature enhancements are new in Sugar Professional 11.0.0 (Q2 2021) when upgrading from the 10.0.x (Q2 2020) release:

Dashboard and User Interface Enhancements

- **Flexible dashboards**
 - [Resizable dashlets](#): Dashlets can now be resized independently of other dashlets by clicking and dragging their sides, bottom, or corners.
 - [Unlimited dashlets](#): Dashboards can now be configured to include an unlimited number of dashlets.
- [Dashboard floating actions button](#): The new floating actions button replaces the dashboard actions menu for common tasks such as creating dashboards, duplicating dashboards, and adding dashlets.
- **Auto-focus cursor on first field in record view**: When creating or editing records in Sidecar modules, the cursor is now automatically focused on the first field (e.g. Subject) in the record view layout.
- **Comment Log Features**
 - [Email notification on mentions in comment log entries](#): Users now have the option to be notified via email when they are mentioned in a comment log entry by enabling the Email on Mention checkbox in their profile.
 - System Comment Log Email Notification template: Administrators can configure the comment log email notification template via Emails > View Email Templates.
- [Multiple note attachments](#): You can now attach multiple files to notes using the new Attachments field. The system-level "Is Attachment" field can be used to differentiate between directly-created notes and notes that are an attachment to another record (i.e. email, knowledge base article, or other note) in the Reports module.
- **Filter enhancements**
 - **Increased list view filter limit**: The default number of List View filters has been increased to 50.
 - [Filtering on inactive users](#): You can now locate records assigned to

inactive users by filtering on user status.

- **Enhanced filtering for [Meetings](#) and [Calls](#):** New list view filters show records where the current user is a guest.
- **[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.
- **Added value for call status:** A new value, "In Progress", is available for the Status field on the Calls module.
- **Viewing and refreshing reports from dashlets:** Previously available to only the owner of a dashboard, the "View Report" and refresh chart options are now available on the Saved Reports Chart dashlet for all users.
- **Editing records from report drill-through:** Users can now edit records via preview pane when drilling through report charts.
- **Working with field-level data**
 - **[Clickable hyperlinks in text area fields](#):** Hyperlinks in text area fields are now clickable and will open the link in a new tab.
 - **Preserving field height in edit mode:** Text boxes that are expanded in record view remain expanded after switching to edit view.
 - **Copying field values without triggering edit mode:** Users can click and drag to highlight and copy text from field values in record view.
 - **Added value for call status:** A new value, "In Progress", is available for the Status field on the Calls module.
 - **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.

Studio and Administration Enhancements

- **New Studio field types and options**
 - **[AutoIncrement](#):** An auto-increment field type allows admins to add a unique numerical ID to module records.
 - **[Required If](#):** The administrator can make fields conditionally required.
 - **[Read-only field option](#):** Admin users now have the ability to make a field read-only always or conditionally.
 - **[More field types available for mass update](#):** Admin users can now enable mass update for most field types in Sugar including checkbox, multiselect, and date field types, among others.
 - **Studio access to relationship-based relate fields:** Previously, relationship-based relate fields could not be edited in Studio. Now, they are in the module's Fields list in Studio, where you can adjust

their field-level settings (e.g., enabling them for audit).

- [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.
 - **dayofmonth()**: This new formula will extract the number of the day of the month from a date field.
 - **isInList()**: This updated formula now lets you pass a multiselect field as a second parameter.
- [Data Archiver admin utility](#): A new module lets administrators move non-essential records to a hidden archive table or hard-delete them from the database. The new [Run Active Data Archives/Deletions](#) scheduler job performs the archive or delete actions.
- [Content Security Policy Settings](#): To protect your instance, Sugar now prevents any external web content from loading in elements such as iframes and Web Page dashlets in your Sugar instance until the administrator adds the web domain as a trusted site in the new Content Security Policy Settings.
- [Additional configurable system email templates](#): Additional system email templates are now available to configure via Emails > View Email Templates: "Assignment Notification Emails", "Call Notifications Emails", "Meeting Notifications Emails", "Scheduled Report Emails".
- [Improved click-to-call](#): When the Click-to-Call option (formerly called SkypeOut Integration) is enabled, all phone number fields in Sidecar modules are displayed as clickable links so you can dial out using your computer's default telephony application.
- [Enable or disable notifications per API platform](#): Administrators can control whether users should receive assignment notifications when records are created via API on a per-platform basis via Admin > Configure API Platforms.
- **Package scan health check**: Package Scanner now runs a full health check against module loadable packages before installation.
- **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.

Sales-Focused Enhancements

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- **Seamless integration of SugarCloud instances with [Sugar Discover](#):** This release natively integrates Sugar Discover's revenue analytics dashlets, eliminating the need for Sugar Discover customers to install the dashlets to their SugarCloud instance via Module Loader.
 - **[Quote layout updates sync to Sugar Mobile](#):** The Quote Worksheet layout in Sugar will now sync to the Quotes detail view in Sugar Mobile. For those upgrading to 11.0, the administrator must re-save the Quotes Configuration admin page for the layout to be applied in the mobile app.
 - **Negative quantity amounts:** Support for negative "Quantity" values, which can be used for credits or price adjustments, has been added to the Quoted Line Items module.

Email Template Enhancements

- **[Email Templates converted to Sidecar](#):** The Email Templates module has been converted from the legacy user interface to the Sidecar interface.
- **[Cases in Email Template Variables](#):** The Cases module has been added to the available modules from which variables can be used in email templates.

Fixed Issues When Upgrading From 10.3 (Q1 2021)

The following issues are resolved in version 11.0.0 (Q2 2021) when upgrading from the 10.3 (Q1 2021) release. [Case portal users](#) can use the following links for more details about each issue:

- [86702](#): Resetting a user's password may not work as expected and display an error for instances that have the System-Generated Passwords feature enabled in Admin > Password Management.
- [86574](#): Mass updating the Teams field for records in certain modules (e.g. Accounts, Contacts) does not work as expected.
- [86558](#): Shortcut keys may not work as expected in Sugar 10.3.
- [86538](#): The Target List subpanel is missing from the Campaigns modules.
- [86399](#): In certain circumstances, logging in to a SugarIdentity-enabled instance may display an error message that continues to loop causing login issues for users.
- [86355](#): Installing a package containing multiple issues via module loader does not display all of the errors as expected and only returns a single error.
- [86323](#): Navigating to Admin > Trackers may not display the settings as expected and instead display an error.
- [86322](#): Some schedulers may stop running as the end date values are expired and not updated to an empty value during upgrade. To resolve this

issue, stock schedulers with values in the Date & Time End field will be updated to an empty end date value.

- [86203](#): When users are unable to log in to a SugarIdentity-enabled instance due to failed license validation, the error message that appears is not meaningful enough.
- [86163](#): In certain circumstances, uninstalling a package in Sugar may improperly cause other packages to get uninstalled resulting in unexpected issues.
- [85969](#): When a field is deleted then re-created in Studio using a different Data Type but with the same field name, the field incorrectly gets created using the original Data Type again.
- [85707](#): When logged into Sugar using Safari 14, there may be some unexpected issues with rendering certain areas of Sugar (e.g. Record View layout).
- [85481](#): Comments in the quote worksheet improperly remove any whitespaces entered at the end of the text and does not display the line breaks as expected.
- [85431](#): When accessing Sugar using Chrome, images and/or embedded content may not display as expected in the Knowledge Base record view.
- [85323](#): The body of the Knowledge Base record may not display in full width as expected.
- [85233](#): Updating the quoted line item's discount amount via the API does not trigger the related calculations in the quote's worksheet if the discount type is set to "\$".
- [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.
- [85051](#): Dependent fields may incorrectly display a value when adding or removing columns in the module's list view.
- [84957](#): Certain logic hooks may not trigger as expected for SugarIdentity-enabled instances.
- [84868](#): Records with a non-standard Sugar ID number can cause the value in the relationship's relate field to not copy over to the new record as expected when duplicating the parent record.
- [84174](#): Clicking on a record's direct link from an email may not open up the record in the Sugar mobile app if the instance is SugarIdentity-enabled.
- [84159](#): When a record (e.g. Cases) contains a calculated field using the rollupSum function that refers to another calculated field in the related module (e.g. Notes), clicking the Show More link in the related record subpanel (e.g. Notes) may cause the rollup calculation to be incorrect.
- [83994](#): In certain circumstances, campaign emails sent by regular users may not send as expected and result in unexpected errors.
- [83963](#): In certain circumstances, the exported target list may incorrectly display the wrong related account for a contact.
- [82869](#): The embedded images in emails sent from Lotus Notes may not display correctly when imported into Sugar.

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- [82734](#): The Contracts subpanel does not display the Preview icon as expected.
 - [82693](#): When importing contacts mapped to new accounts, users may experience unexpected behavior if the system detects an error on the file.
 - [82634](#): Updating an existing quoted line item after adding a new quoted line item using the Product Catalog dashlet may fail to save with an error in the quotes worksheet.
 - [82241](#): The Product Catalog dashlet is not available to add for users assigned a role with no access to the Quotes modules.
 - [81999](#): Users may be unexpectedly logged out when requests with out-of-date user_hash data are sent to the server in close succession.
 - [81926](#): Calculated fields on quoted line items in quotes do not update until the page is refreshed.
 - [81624](#): When composing an email, performing a search using the first and last name in the recipient fields or in the address book does pull up results as expected.
 - [81180](#): When composing an email, searching for a record (e.g. contact) that you do not have access to in the email's recipient field (e.g. To) may result in unexpected behavior.
 - [81173](#): Too many labels are created in the language file when deploying a relationship, causing a potential conflict when a subpanel's label is changed or the instance is redeployed, as the changes in [language_key].lang.php may not override the proper labels.
 - [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".
 - [80264](#): When installing packages in Sugar, the package scanner incorrectly flags dropdown lists containing acceptable characters.
 - [79170](#): In certain circumstances, assignment notifications may be sent out improperly due to calculated fields.
 - [78529](#): Inactive users are improperly available to add as guests when creating meetings or calls.
 - [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.
 - [72177](#): Extension files are read by date-modified, potentially causing the files to load in an unintended order when migrating environments. To resolve this issue, a new orderMapping.php Extension file has been added as of 11.0 to preserve the order based on the real modification dates even when the instance files are moved.

Fixed Issues When Upgrading From 10.0.x (Q2 2020)

The following issues are newly resolved in version 11.0.0 (Q2 2021) when upgrading from the 10.0.x (Q2 2020) release. [Case portal users](#) can use the following links for more details about each issue:

- [86702](#): Resetting a user's password may not work as expected and display an error for instances that have the System-Generated Passwords feature enabled in Admin > Password Management.
- [86574](#): Mass updating the Teams field for records in certain modules (e.g. Accounts, Contacts) does not work as expected.
- [86538](#): The Target List subpanel is missing from the Campaigns modules.
- [86355](#): Installing a package containing multiple issues via module loader does not display all of the errors as expected and only returns a single error.
- [86323](#): Navigating to Admin > Trackers may not display the settings as expected and instead display an error.
- [86322](#): Some schedulers may stop running as the end date values are expired and not updated to an empty value during upgrade. To resolve this issue, stock schedulers with values in the Date & Time End field will be updated to an empty end date value.
- [86163](#): In certain circumstances, uninstalling a package in Sugar may improperly cause other packages to get uninstalled resulting in unexpected issues.
- [85969](#): When a field is deleted then re-created in Studio using a different Data Type but with the same field name, the field incorrectly gets created using the original Data Type again.
- [85904](#): Drilling through report charts may not display the report chart as expected in the intelligence pane of the filtered list view drawer.
- [85822](#): The Projects record view may not display the related record subpanels as expected.
- [85784](#): In certain circumstances, inbound emails may fail to import to Sugar and generate an error.
- [85709](#): Elasticsearch fails to index records when a scheduler (e.g. Prune Database on 1st of Month) fails with an error.
- [85707](#): When logged into Sugar using Safari 14, there may be some unexpected issues with rendering certain areas of Sugar (e.g. Record View layout).
- [85705](#): Performing a global search may improperly create new dashboards assigned to the current user.
- [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.
- [85481](#): Comments in the quote worksheet improperly remove any whitespaces entered at the end of the text and does not display the line breaks as expected.
- [85457](#): Clicking a link in the Knowledge Base article may not work as

expected and cause the body of the article to appear dark.

- [85431](#): When accessing Sugar using Chrome, images and/or embedded content may not display as expected in the Knowledge Base record view.
- [85331](#): Performing certain administrative actions (e.g. performing Quick 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.
- [85286](#): The Sugar licensing data is not validated properly prior to getting added to the database.
- [85234](#): The Prune Database on 1st of Month scheduler job may fail with an error when executed in Sugar 10.x.
- [85233](#): Updating the quoted line item's discount amount via the API does not trigger the related calculations in the quote's worksheet if the discount type is set to "\$".
- [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.
- [85201](#): Instances with a large amount of data may experience 500 errors and performance issues when the Product Definitions Updates job is running.
- [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.
- [85051](#): Dependent fields may incorrectly display a value when adding or removing columns in the module's list view.
- [84975](#): Database updates that do not include an ID parameter are permitted without throwing a warning or error.
- [84868](#): Records with a non-standard Sugar ID number can cause the value in the relationship's relate field to not copy over to the new record as expected when duplicating the parent record.
- [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.
- [84693](#): Sugar may improperly truncate field labels in the record view layout when resizing the browser window.
- [84677](#): In certain circumstances, the unsaved changes warning message may improperly display when users attempt to navigate away from the quote record.
- [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.
- [84433](#): API requests no longer fail due to global search indexing deadlock.
- [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.
- [84365](#): In certain circumstances, users may experience performance issues after upgrading to Sugar 10.0.0.
- [84283](#): Fields that a user does not have access to based on their assigned license type improperly displays in the module's layouts (e.g. record view) in Sugar.
- [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.
- [84159](#): When a record (e.g. Cases) contains a calculated field using the rollupSum function that refers to another calculated field in the related module (e.g. Notes), clicking the Show More link in the related record subpanel (e.g. Notes) may cause the rollup calculation to be incorrect.
- [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.
- [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.
- [83994](#): In certain circumstances, campaign emails sent by regular users may not send as expected and result in unexpected errors.
- [83975](#): The Date Created and Date Modified fields in the Opportunities record view incorrectly display the values in three separate lines instead of a single line like the other Sidecar modules (e.g. Accounts, Contacts).
- [83969](#): Generating a report containing custom fields and grouped by "Fiscal Quarter" may result in a database failure error.
- [83963](#): In certain circumstances, the exported target list may incorrectly display the wrong related account for a contact.
- [83858](#): The Product Catalog Quick Picks dashlet improperly truncates product names containing more than 25 characters.
- [83843](#): Quoted line items added to existing quotes using the Product Catalog dashlet may be assigned to the incorrect user.
- [83774](#): In certain circumstances, users may experience unexpected errors while utilizing Sugar.
- [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.
- [83350](#): Saving a record containing tabs with required fields in the layout may result in unexpected behavior when a validation error occurs due to incomplete fields.
- [83301](#): In certain circumstances, the tooltip (e.g. Create) may continue to persist improperly while navigating through Sugar.
- [83099](#): Users accessing a record at the same time that the record's assigned teams is being changed may lose access to the record during the save event.
- [83091](#): Report chart drill-through may not work as expected and display incorrect data for users in different timezones.
- [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.
- [82869](#): The embedded images in emails sent from Lotus Notes may not display correctly when imported into Sugar.
- [82758](#): Emails sent from Sugar do not use the user's "reply-to" email address as expected and incorrectly defaults to a different address (e.g. primary email address).
- [82737](#): The Password field for Sugar's email settings is improperly limited to a length of 64 characters.
- [82734](#): The Contracts subpanel does not display the Preview icon as expected.
- [82693](#): When importing contacts mapped to new accounts, users may experience unexpected behavior if the system detects an error on the file.
- [82637](#): Health check incorrectly flags versions 6.0.5 and higher of the wMaps package as incompatible.
- [82636](#): Health check incorrectly flags versions 2.0.1 and higher of the BulkCrudApi package as incompatible.
- [82634](#): Updating an existing quoted line item after adding a new quoted line item using the Product Catalog dashlet may fail to save with an error in the quotes worksheet.
- [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.
- [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.
- [82484](#): Attempting to undo an import may not work as expected and fail for modules containing custom fields.
- [82464](#): When the "Round Numbers Over 100000" option is enabled in the

report's chart option, hovering on a segment of the generated report chart may not display the correct value for Integer fields as expected.

- [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.
- [82274](#): In certain circumstances, when multiple save events are triggered in the meeting/call record, the system may improperly send out duplicate invitations.
- [82241](#): The Product Catalog dashlet is not available to add for users assigned a role with no access to the Quotes modules.
- [82041](#): Report chart values may not render correctly for Integer fields when using a period as the 1000s separator in the user's profile.
- [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](#).
- [81999](#): Users may be unexpectedly logged out when requests with out-of-date user_hash data are sent to the server in close succession.
- [81926](#): Calculated fields on quoted line items in quotes do not update until the page is refreshed.
- [81922](#): In certain circumstances, generating a Summation With Details report grouped by "Week: Start Date" may not display the records (e.g. meetings) grouped correctly if the date range spans multiple years.
- [81624](#): When composing an email, performing a search using the first and last name in the recipient fields or in the address book does pull up results as expected.
- [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 secondary database may experience unexpected behaviors if the report query is slow and tries to reconnect.
- [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.
- [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.
- [81272](#): Regular users cannot edit the Type Name field in the Contracts record view.
- [81180](#): When composing an email, searching for a record (e.g. contact) that you do not have access to in the email's recipient field (e.g. To) may result in unexpected behavior.
- [81173](#): Too many labels are created in the language file when deploying a relationship, causing a potential conflict when a subpanel's label is changed or the instance is redeployed, as the changes in [language_key].lang.php may not override the proper labels.
- [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".

- [80992](#): The "Loading..." message may improperly appear in the Guests panel for call and meeting records.
- [80936](#): When updating records via import, the "Date Modified" and "Modified By" fields may not update as expected.
- [80672](#): Renaming modules using a different language (e.g. German) than the language (English (US)) you are currently logged into Sugar with may result in unexpected behavior with the module labels.
- [80623](#): Web logic hooks may not work as expected when triggered by non-admin users.
- [80376](#): Uninstalling custom modules from Sugar may not delete the associated workflows as expected.
- [80264](#): When installing packages in Sugar, the package scanner incorrectly flags dropdown lists containing acceptable characters.
- [80158](#): Having a value of "0" in the Item Name or Display Label of a dropdown list (e.g. account_type_dom) may cause unexpected behaviors in Sugar.
- [79938](#): Calculated fields containing a dependent dropdown list may not be calculated properly and display an incorrect value.
- [79170](#): In certain circumstances, assignment notifications may be sent out improperly due to calculated fields.
- [79052](#): A blank space may improperly appear in the module's record view in place of any dependent fields that are hidden in the layout.
- [78529](#): Inactive users are improperly available to add as guests when creating meetings or calls.
- [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.
- [77402](#): Uploading a package via Admin > Module Loader may not work as expected when using AWS S3 storage for uploads.
- [76271](#): When creating a call or meeting record with repeat type set to "Weekly", the "Repeat on Days of Week" field incorrectly defaults to the current day that the record is being created instead of populating based on the "Start Date".
- [76180](#): Clicking the hyperlinked number (e.g. "6+") in a subpanel's record count may improperly cause the record count to disappear if the subpanel is in a collapsed state.
- [73689](#): The user-defined list view column widths may not be preserved if the browser window is resized or the list view's intelligence pane is opened/closed.
- [72177](#): Extension files are read by date-modified, potentially causing the files to load in an unintended order when migrating environments. To resolve this issue, a new orderMapping.php Extension file has been added as of 11.0 to preserve the order based on the real modification dates even

when the instance files are moved.

- [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 11.0.0 (Q2 2021). [Case Portal users](#) can use the following links for more details about each issue:

- [86646](#), [86493](#): Note attachments may not display as expected after upgrading to version 10.3 or higher.
- [86639](#): Clicking the Preview (Eye) icon in the Guests panel for calls and meetings may not work as expected.
- [86010](#): Auditing relate fields connected to 1:1 relationships only audits changes on one side.
- [85962](#): Dashlets with filters on a shared dashboard may not be accessible to members of the associated team(s) as expected.
- [85795](#): When editing the existing inbound email account, the User Name field does not display a value and appears blank in the layout. As a workaround, you can copy the user name value from the inbound email account's detail view and paste it in the edit view when configuring the inbound email account.
- [85593](#): Multiple entries get added to the Tracker table for Activity Stream records causing the table to grow very large.
- [85589](#): Saving the SAML settings may fail with an error "Maximum Length should be positive value" when the maximum length is not set for Sugar password requirements.
- [85550](#): In certain circumstances, the funnel chart in reports may display incorrect values.
- [85458](#): The body of the email does not display as expected when accessing Sugar via Firefox 80. As a workaround, open the Developer Tools console and refresh the page to view the email body.
- [85435](#): The subpanel column widths may not behave as expected in certain circumstances to display all the columns without having to use the scrollbar.
- [85410](#): In certain circumstances, the Related Case field in the Knowledge Base record view may not display the linked record as expected after upgrade.
- [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.

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- [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.
 - [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.
 - [85246](#): Errors may get logged in the system after upgrading or installing Sugar when certain license data is missing.
 - [84909](#): Hyperlinks are not clickable in text area fields for Legacy modules (e.g. Documents). As a workaround, add "https://" in the URL (e.g. https://www.example.com) for Legacy modules and the hyperlink will then be clickable.
 - [84884](#): For SugarIdentity-enabled instances, employee records that are tied to a user record in the Cloud Settings console cannot be duplicated in Sugar.
 - [84692](#): Certain reports may not generate as expected if the last group-by field is a date (e.g. Opportunities > Week: Expected Close Date) and the report contains a chart (e.g. Horizontal Bar).
 - [84684](#): In certain circumstances, saving the Preview View layout for modules (e.g. Accounts) via Admin > Studio may not work as expected and result in an error.
 - [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.
 - [83997](#): Adding additional panels/tabs or removing the Show More panel in the Record View Layout in Studio may cause the record view layout to display incorrectly. As a workaround, restore the default layout in Admin > Studio.
 - [83985](#): When the "Field Name Placement" user preference is set to "Beside Field Value", some labels will remain above the field value for the Calls and Meetings modules.
 - [83716](#): Attempting to deploy a package via Module Builder or Module

Loader may fail with an error.

- [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.
- [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.
- [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.
- [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.
- [82742](#): The Forecast Bar Chart Dashlet may not load as expected in shared dashboards.
- [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.
- [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.
- [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.
- [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.
- [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.
- [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.
- [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.

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- [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.
- [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).
- [71848](#): When a large number (e.g. 60) of PDF templates are available in a module, users may not be able to scroll through the full list of templates via the "Download PDF" or "Email PDF" options in the record view. As a workaround, changing the screen resolution or reducing the number of templates may help resolve the issue.
- [71733](#): Printing archived emails via the browser's print option may not display correctly.
- [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.
- [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 11.0.0 (Q2 2021) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 11.0.x Supported Platforms](#).

Upgrade Paths

Sugar Professional Upgrade Paths

Package	From Version(s)	MySQL	SQLServer
New Installs		☐	☐
10.0.4-to-11.0.0	10.0.4	☐	☐
10.2.1-to-11.0.0	10.2.1	☐	☐
10.3.0-to-11.0.0	10.3.0	☐	☐

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