Sugar Open Source
Release Notes

Version 4.5

Sugar Suite™ *Sugar OpenSource Release Notes*
Version 4.5, 2006

Introduction

This document describes the new features and enhancements in Sugar Open Source 4.5. In addition, known issues and bug fixes pertaining to this release are included.

You can upgrade from Sugar Suite versions 4.0.1 or 4.2.1 to 4.5.

CAUTION: It is recommended that you make a copy of your production systems and use it to test 4.5.

Please continue providing feedback on this release as we continue to develop Sugar Suite functionality for the upcoming releases. We will continue to work to incorporate your feedback into the development process. The SugarCRM Development Team is closely monitoring the following channels and is making every effort to fold your feedback into upcoming releases.

You can provide feedback through the SugarCRM Bug Portal, accessible through http://bugs.sugarcrm.com. Use 4.5 RC to designate new bugs found in this release. Otherwise, please update existing bugs with additional information.

Check the Bug Portal for known issues prior to submitting bugs.

Topics include:

Requirements for 4.5

- To install Sugar Suite 4.5 successfully, ensure that the MB String module is installed in your PHP libraries.
- If you are using MySQL, you must install version 4.1.2 or higher to use with Sugar Suite 4.5.
- For Microsoft Exchange, Sugar Suite supports only versions 2000 and higher.

New and Enhanced Features

Internationalization.

Sugar Suite now supports UTF-8 and multi-byte character sets to enable organizations with offices in different language zones to use the same installation of Sugar Suite. You can store data, perform a search, create reports, and send emails in any language.

Configurable Home Page.

The Home module now displays information as a collection of *dashlets*. Users can reconfigure these dashlets to display only the information that they want to view. In each dashlet, you can add and remove columns, set filters to view information for a specific time period, a specific

team, a specific user, and so on. Users can add and remove dashlets and move them to any location on the page to reconfigure their home page.

Forums.

The Forums module allows organizations to create different forums as a means of collaboration on technical, sales, or general topics among their users. For each forum, you can create one or more threads of discussion on a specific opportunity, bug, or case.

Forums is not a core module. Administrators will need to load it using the Module Loader.

Studio.

The new Studio wizard guides administrators through the process of editing module layout, custom fields, drop-down list, and the history information. You can also reconfigure and rename tabs, edit workflows, and edit portals.

Sugar Suite Licensing.

For Sugar Open Source, SugarCRM now offers two licensing options:

- Sugar Public License (SPL), which you can use with MySQL.
- SugarCRM Community License (S-CL), which you can use with MS SQL Server.

Module Functionality.

- When you schedule a call, you can now associate it with a contact.
- You can compose an email about a bug, you can now associate it with a case number.

Sugar Themes.

- The default theme, Sugar, has changed. Additionally, Sugar Suite now has a new theme named Spectrum.
- For the Sugar theme and the Bold Move theme, you can change the color and the font by clicking the appropriate box located next to the About button on the Home page.

Merging Duplicate Records.

Sugar Suite now supports merging duplicate records for the following modules: Accounts, Contacts, Leads, Opportunities, Cases, and Bugs. You can merge a maximum of five duplicate records at a time.

If you have more than one record for an item, you can merge them to update and clean up your data. You can select which fields you want to merge and when the process completes, the system deletes the duplicate records.

Active Directory Authentication Plugin.

Sugar Suite can now authenticate AD users who attempt to log into Sugar Suite, by validating user names and passwords against AD. Administrators can also use AD to create new users in Sugar Suite. This feature also works with open LDAP.

Upgrade Wizard.

The Upgrade Wizard has been enhanced to perform system checks and commit upgrade files to allow administrators to effortlessly upgrade their current Sugar Suite application.

Import.

When you import data into Sugar Suite, you can check indexes for duplicate values.

MS SQL Server Support

Sugar Suite now provides support for MS SQL.

Saved Search and Layout.

After you perform a search, you can now save the search results for future use. You can filter and rearrange the search results by hiding unwanted columns and sorting the visible columns in ascending or descending order. You can also order the search results by columns.

Global Search.

You can now set filters to specify the modules that you want to search for information.

List view.

Each row in the list view now displays Edit and View icons. Clicking the Edit icon displays the edit view for the record; similarly, clicking the View icon displays the detail view for the record.

Sub-panels.

On a module detail page, you can minimize sub-panels that you do not need to view. You can also drag and drop a sub-panel to a different location on the page. These changes are persistent across sessions.

Documentation.

The Graphical User Interface now provides online help.

Compatibility Matrix

SUGAR BUILDING BLOCKS	SUPPORTED VERSIONS	COMMENTS
PLATFORM		
• LINUX	Any flavor of Linux (Ex : RHEL 4.0)	Sugar runs on all versions that run PHP
• WINDOWS	2000, XP,2003	
• MAC OS	X	
PHP	4.3.11	
	4.4.1 - 4.4.2	
	5.0.1 – 5.0.4	
	5.1.0, 5.1.2, 5.1.4	
DATABASE		
• MYSQL	4.1.2 or higher,	
• SQL Server	2005	
WEB SERVER		
• APACHE	1.3.x, 2.0.x, 2.2.x	Supports any version that runs PHP
• IIS	5.x, 6.0	Supports any version that runs PHP
SUGAR PLUG-INS		
• Sugar Plug-In for Microsoft Outlook	Outlook 2000, Outlook 2002(XP), Outlook 2003	
• Sugar Plug-in for Microsoft Word	Office 2003, Office XP	
• Client (Browser)	latest Mozilla	
	latest Firefox	
	IE 6.0	
Recommended Stacks		
Linux Stack		
• PHP version	5.1.4	
• Apache	2.2.3	
• RedHat Enterprise	Workstation 4	
• **Preferred Databases** MySQL SQL Server	5.0.24a 2005	
Windows Stack		
• PHP version	5.1.4	
• IIS	6.0	
• Microsoft Windows	2003	
• **Preferred Databases** MySQL SQL Server	5.0.24a 2005	

Known Limitations

- If you share a MySQL database user name between two instances of Sugar Suite applications where one is a pre-4.5.0 version and another is a 4.5.0 version, you may run into periodic collation errors. An example error is:

  ```
  MySQL error 1267: Illegal mix of collations
  (utf8_general_ci,COERCIBLE) and
  (latin1_swedish_ci,IMPLICIT) for operation ...
  ```

  This is caused by sharing of connections between two applications using different collations. Release 4.5.0 uses UTF-8 encoding and collation, while prior releases used the default setting.

  To correct this problem, please use different user names for accessing the MySQL databases. This is a general issue, therefore the interference could also happen between the Sugar Suite application and another application.

- If you have created an index in MySQL database with key length of more than 333 characters, the upgrade to Sugar 4.5 will cause an error during the database character set conversion. MySQL displays the following error message:

  "Specified key was too long; max key length is 1000 bytes"

  This is a MySQL limitation. The 333 characters limit is for the combined length of all fields you specified as key for the index.

  You must drop the index and recreate it so the index uses fewer characters from the columns. Internally, MySQL accounts 3 bytes for each character during the UTF-8 conversion.

- After you upgrade the Upgrade Wizard, the system directs the user to the value specified for the Site URL parameter in the config.php file. Therefore, ensure that this value is set to your test instance instead of your production instance before you begin upgrading the Upgrade Wizard. This will prevent inadvertent changes to your production instance.

- If you have created an index in MySQL database with key length of more than 333 characters, the upgrade to Sugar 4.5 will have an error during the database character set conversion. The error message "Specified key was too long; max key length is 1000 bytes" comes from MySQL and is a MySQL limitation. The 333 characters limit is for the combined length of all fields you specified as key for the index. You must drop the index and recreate it with fewer characters. Internally MySQL accounts 3 bytes for each character during the UTF-8 conversion.

- When you upload a module, it might take a few minutes to display on the Module Loader page if the cache has not yet been refreshed. It can take upto five minutes for the cache to refresh.

Known Bugs

Sugar Installation

Bug 8406

> When you install Sugar Suite with the Chinese Yuan as the default currency, the system displays the currency symbol before the amount instead of displaying it after the amount.

Bug 8654

> During installation, if you select MySQL database, the MySQL version does not display.

Sugar Modules

Bug 6906

> When you duplicate a bug, the original value in the Display in Portal field is replaced with the default value.

Bug 8360

> When you open an existing opportunity and save it without making changes, the system still creates a Change Log file for it.

Bug 8363

> When you attempt to edit the value of a custom field using the Mass Update panel, the system displays an "Undefined property" notice.

Bug 8402

> When you create a new custom field with a default value and add it to the Edit view of a module, the value does not display in the detail view.

Bug 8410

> The last page of a list view does not display records if the number of records in the module is a multiple of the number of records per page in the list view (for example, if the number of records per page is 100 and the total number of records is 1000).

Bug 8609

> When you import records into a module and sort them, the system displays an "Undefined index" notice.

Bug 8616

> When you view the status of an email campaign that was sent, the system displays an "Undefined index" notice.

Bug 8686

> When you attempt to cancel a case that you tried to create using the Create Case quick form from an inbound email, the system displays a warning and a fatal error message.

Bug 8691

> When you search for a contact in the Call list view, an error message displays.

Bug 8698

> When you edit an email that you already sent, the History sub-panel displays only the edited version of the email though it displays the total number of records as 2.

Bug 8701

> When the Notes sub-panel of the Contacts module is paginated and you click the Next button, the system displays an error message.

Bug 8711

> The icon for the attachment type in the document list view displays as a blank column name in Saved Search.

Administration

Bug 8254

> When you select the group modules option, the system does not group the tabs under the Configure Group Tabs option in Studio.

Bug 8280

> When a user is granted a restricted role for one module and the administrator role for another module, the administrator privileges do not take effect.

Bug 8364

> When you preview the history of a module in Studio, the system displays an "Undefined index" notice.

Sugar Plug-ins

Bug 8622

> When using the Sugar Plug-in for Microsoft Outlook, an attempt to synchronize appointments and tasks fails.