



SUGARCRMTM
COMMERCIAL OPEN SOURCE

Sugar Community Edition Release Notes

Version 5.2e

Sugar Community Edition Release Notes
Version 5.2e, 2009

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Introduction

This document describes the requirements, new features, enhancements, and known limitations in Sugar Community Edition 5.2e.

You can upgrade from Sugar versions 5.0x, and 5.1 to Sugar version 5.2e.

Note: It is strongly recommended that you make a copy of your production system and use it to test 5.2e.

Please continue providing feedback on this release as we continue to develop Sugar 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 your feedback and is making every effort to fold it into upcoming releases.

For more information on a bug or to provide feedback, use the SugarCRM Bug Portal which is accessible through <http://bugs.sugarcrm.com>. Use “5.2.0e” to designate new bugs found in this release. You can also update existing bugs with additional information.

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

Topics include:

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Requirements for 5.2

Requirements for 5.2 are as follows:

- Increase the value of the `memory_limit` parameter in the *php.ini* file as follows:
 - MySQL Server: 40M or higher
 - MS SQL Server: 40M or higher
- To install Sugar 5.2 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 5.2.
- For Microsoft Exchange, Sugar supports only versions 2000 and higher.
- Before upgrading to 5.2, navigate to the *php.ini* file on your system and change the *post_max_size* and *upload_max_filesize* settings to more than 20MB. Restart Apache and then begin the upgrade process.
- The process of upgrading to 5.2 can take up to an hour. If you are using the IIS Web server, you need to ensure that the CGI application does not time out. To do this, on IIS, set the CGI script timeout to more than 300 seconds, which is the default value.

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- If op-code caching is enabled in the PHP configuration file, you will need to disable it before upgrading your Sugar installation. You can enable it after the upgrade process is complete.
 - In order to better support multi-byte character storage with Microsoft SQL Server, You can configure Sugar to use FreeTDS driver. see “Installation Prerequisites and Guidelines” in the *Sugar Community Edition Installation and Administration Guide*. The supporting files are in a zip file, *sugarcrm-MB-mssql.zip* at http://www.sugarforge.org/frs/?group_id=6.

New Features, Enhancements, and Behavior Changes

Sugar 5.2d

A new Repair option named “Repair Non-Lowercased Fields” allows you to use mixed-case field names when searching for records.

Sugar 5.2c

New Setting for the Sugar Calendar

Sugar now provides a new setting, vCal Updates Time Period, in the Advanced section of the System Settings Page. Administrators can use this setting to specify the number of months in advance of the current date that Free/Busy information for calls and meetings is published. The minimum value is one month, and the maximum value is 12 months. To turn off Free/Busy publishing, enter “0”.

Sugar 5.2

Sugar 5.2 offers the following new and enhanced features.

Connectors to External Data Sources. Sugar provides a connector to LinkedIn. Additional connectors to other data sources can be obtained and installed using Module Loader.

Sugar Feed. Sugar Feed enables users to be informed as soon as a user creates a new contact, lead, opportunity, or case. Users can add a My Sugar Feed dashlet on their Home page so that when a user performs any of these actions, a message displays in the dashlet on their Home page. Users can also be notified when a lead is converted, when a case is closed, and when an opportunity is closed.

Additionally, users can post status updates, external links, images, and YouTube videos for other users to view within the dashlet.

My Portal Dashlet . Sugar provides a My Portal dashlet that presents product information and news about SugarCRM on your Home page. You can add additional My Portal dashlets to view information from external web sites and applications directly within your Sugar instance.

Sorting drop-down lists. When you create or edit a drop-down list, you can now sort items in ascending or descending order.

Compatibility Matrix

SUGAR BUILDING BLOCKS	SUPPORTED VERSIONS	COMMENTS
PLATFORMS		Sugar runs on any OS that runs PHP
• Linux	Red Hat 4.x, 5.x (Advanced Server, Enterprise Server) Oracle Enterprise Linux 5.1 CentOS 4.x, 5.x	
• Windows	XP, 2003, Vista	
• Mac	OS X	
PHP		
PHP (MYSQL, SQL Server)	5.1.0 - 5.1.2, 5.1.4, 5.1.6, 5.2.1-5.2.6, 5.2.8, 5.2.9	
DATABASES		
• MYSQL	4.1x, 5.0x, 5.1	
• MS SQL Server	2005	
WEB SERVERS		
• Apache	1.3x, 2.0x, 2.2x	Supports any version that runs PHP
• IIS	5.1, 6.0, 7.0	Supports any version that runs PHP
SUGAR PLUG-INS		
• Sugar Plug-In for Microsoft Outlook	Outlook 2003, 2007	
• Sugar Plug-In for Thunderbird	Thunderbird 1.5, 2.0	
• Sugar Plug-in for Microsoft Word	Word 2003, 2007, XP	
• Sugar Plug-in for Microsoft Excel 5.1	Excel 2007	
• Client (Browser)	Firefox 2.0 and 3.0 IE 6.0, 7.0, and 8.0 Safari 3.0x	
MULTIMEDIA		
• Adobe Flash	7 and above	
Recommended Stacks		
Linux Stack		
• PHP version	5.2.8	
• Apache	2.0.63, 2.2.4	
• RedHat Enterprise	Workstation 4	
Preferred Databases		
MySQL	5.1	
SQL Server	2005	

Windows Stack		
• Windows	2003	
• PHP version	5.2.8	
• IIS	6.0	
Preferred Databases		
MySQL	5.1	
SQL Server	2005	

Notes:

1. Strict mode is supported for MYSQL.
2. The PHP setting, `MBstring.func_overload=7` is supported.

Changes to the Sugar Graphical User Interface

This section lists miscellaneous changes to the Sugar User Interface in 5.2c:

- In Studio, the Contact field has been removed from the Edit View of the Calls module and the Meetings module.
- The Emails module now provides a Print button to print inbound emails.

Fixed Bugs in 5.2e

Bug 29753 (Sugar Enterprise, Professional, and Express only)

In 5.2.0d, Group users were included in the number of licensed users. Hence, if the number of users exceeded the number allotted under your license because of Group users, the system displayed a warning.

Fixed Bugs in 5.2d

Bug 20619

The `get_relationships` function fails for custom modules.

Bug 20728

Fields referencing a custom drop-down list that was not created through the Module Builder do not load properly in Module Builder when exported and loaded on another system, and hence cannot be edited in the new system.

Bug 22836

The Group User name does not display in the record's Detail View.

Bug 25151

When you click an email address in the Employees List View to compose an email, the "To" field does not display.

Bug 25485

When using a SQL Server database, when you sort a paginated Accounts List View by a custom field, the system displays an “incorrect syntax” error if you click the Next button to navigate to the next page.

Bug 25598

The value Amount of an opportunity is not converted correctly from EUR to USD for a contract with a default currency of EUR.

Bug 25718

You are unable to import data for custom multi-select fields with default value.

Bug 26666

You cannot use mixed-case field names in Search forms.

Bug 27476

When installing Sugar 5.2.0 with MS SQL database, an error prompts Sugar to create a new MSSQL user.

Bug 27490

Account links in the Contacts dashlet are incorrect.

Bug 27491

Related record links in the Meetings dashlet are incorrect.

Bug 27564

When composing an email, personal and group email addresses are not differentiated in the “From” drop-down list.

Bug 27674

If you do not have the latest Sugar version, the Configure Sugar Updates page displays strange characters.

Bug 27693

When you click an email address from the Leads List View, the To field does not display the email address of the lead.

Bug 27877

Roles created for a custom module are deleted if you re-deploy the module.

Bug 28159

The Campaign Log label incorrectly displays as “Campaigns”.

Bug 28411

The My Pipeline By Sales Stage dashlet displays wrong total sum value if the user’s default currency is different from the system default currency.

Bug 28412

Bar charts do not work if the user’s default currency is different from the system default currency.

Bug 28461

When importing multi-byte data into Sugar, the length is calculated in bytes instead of characters.

Bug 28586

When you run a cron job from the Sugar User Interface or cron.php from the command line, the tracker table is populated when Tracker Actions is the only box selected on the Tracker Settings page.

Bug 29037

When importing emails, any email with the word “java” in the message ID is imported multiple times.

Fixed Bugs in 5.2c

Bug 23198

Attempting to import drop-down list values with a language pack other than English results in an import error.

Bug 23485

During import, the system accepts display values but not the database values.

Bug 26525

While importing data, if you undo the last import, the system unlinks the updated contacts from the related accounts.

Bug 26667

When you email an Email template in plain text format, the line breaks are not preserved.

Bug 26933

When users select the Show Full Name option on the My Account page, Sugar Feed and User Feed entries do not display users' full names.

Bug 27046

The following issues related to importing data have been fixed:

- Use the default values on the import if the field validation fails.
- Trim back text instead of failing when string length is too long.
- Sort fields alphabetically in the field picklist.
- Do not automatically populate the 'Save Mapping As' field.
- Validate relate fields against their native type as defined in the related bean.

Bug 27179

When you edit a custom currency field and save it, the data is truncated.

Bug 27313

After you create a custom relate field in Studio, Sugar creates a new column in the Sugar database whenever you save the field.

Bug 27467

Import does not ignore spaces before and after values in drop-down fields.

Fixed Bugs in 5.2a

Bug 19781

In Studio, field labels do not warp around if they extend past the width setting resulting in an increase in page width.

Bug 21117

In Studio, default values for custom fields are not stored if they are set to “No”.

Bug 23449

If you use the Firefox browser to log into Sugar and choose the “Remember Now” option to remember your Sugar password, and then enable the Self Service Portal option, when you edit a contact record with blank portal name and password fields, the system populates these fields with your Sugar user name and password.

Bug 24527

If you create custom fields in the Module Builder using a non-English language pack, and then change to the English language pack, Sugar does not display the custom field labels in English.

Bug 24929

When you create a currency field in Studio and add it to the List View layout, the layout displays only digits before the first thousand separator.

Bug 24930

In Studio, if you remove the “Any Email” field from a layout and deploy your changes, you cannot add the field back to the layout later on because it is no longer available.

Bug 24998

When a user who does not have access to the Contacts module attempts to specify an email address for a lead, Sugar starts checking if the email address already exists in the system but does not complete the process.

Bug 25023

When you log into Sugar using a language pack that is not the default, you cannot delete items from drop-down lists in Developer Tools.

Bug 25064

Radio button selections on Web-To-Lead forms in the Campaigns module are not preserved.

Bug 25225

In the Settings window of the Emails module, the Folders tab displays multiple sets of personal folders for all users.

Bug 25433

When you undo an import that updated records, Sugar deletes the updated records instead of restoring the previous version.

Bug 25597

Pipeline graphs display currency values in US dollars when the system default is set to a different currency.

Bug 25747

When you import data into the Accounts module, any updated record is assigned to the user who updated it instead of the user who was originally assigned to the record.

Bug 25772

When the default currency for a user is different from the system default currency, currency conversions that display on the user's dashboard may be incorrectly calculated.

Bug 25925

When a user sends out an email, Sugar uses the "From" address set in the inbound email account as the "reply-to" address instead of the "reply-to" address specified on the My Account page.

Bug 26069

After you create and deploy a custom module using the "File" template, when you view a record in the module, the Last Viewed tracker does not display the record name.

Bug 26179

Users assigned to a role that does not have permissions to edit records in the Accounts module can still create accounts.

Bug 26182

Users assigned to a role that does not have permissions to edit records in the Accounts module can still use the Quick Create form to create accounts.

Bug 26185

An attempt to import data with custom fields from a .csv file fails with an error message.

Bug 26219

When you import data for notes from a .csv file, the first field in a row may be appended to the last field in the previous row. As a result, Sugar imports only the first row data.

Bug 26653

After you create and save a custom module in the Module Builder, you cannot edit the module name.

Bug 26687

Custom fields added through Studio in a non-English language are not updated to English on “Edit Label” page when you change to the English language pack.

Bug 26857

An attempt to use the Silent Upgrader or Upgrade Wizard to upgrade from 5.0 to 5.1.0c fails with an error message.

Bug 27065

You can successfully import data into the Notes module from a .csv file but Sugar displays a “Undefined Property” error message.

Bug 27128

When you import and update notes, Sugar displays a “Undefined Property” error message.

Bug 27217

Emails can be assigned to the Group User for action.

Known Limitations

- Some entry points were changed in Sugar 5.1. Hence, a custom file created in 5.0, unless you manually updated it with the new entry point in 5.1, may fail in 5.2 with the error message “Not a valid entry point”.

For example, if you have customized vCard, navigate to *custom\modules\<module name>\metadata\detailviewdefs.php* and replace `<name="vcard" action="vCard.php">`

with the following:

```
<name="vcard" action="index.php">
```

```
<input type="hidden" name="entryPoint" value="vCard">
```

