



# Sugar Suite 4.0 Open Source

## Release Notes

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## Overview

Welcome and thank you for selecting Sugar Suite as your customer relationship management system. This Release Notes document describes the features, changes, and known limitations of Sugar Suite 4.0. In addition, Changes and Bug Fixes pertaining to this 4.0.1 release are included. 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 in the following manner:

- Via the SugarCRM Bug Portal, accessible through <http://bugs.sugarcrm.com>. Please use 4.0.1 to designate new bugs found in this release. Otherwise, please update existing bugs with additional information.

Please check the Bug Portal for known issues prior to submitting bugs.

## Features List

Sugar Suite 4.0 Open Source functionality includes:

- UI enhancements
- Campaign Management improvements
- Access Control List for additional security
- Sugar Plug-In for Word (Mail Merge)
- Inbound Email Processing for monitoring, routing, and assigning emails and for automating responses

## Changes since Sugar Suite 3.5.1

### Campaign Management

- Many to many relation between emails and prospect list
- Independent scheduling of email messages
- Configurable Emailman settings such as defining the number of emails to be processed
- List management of list types such as seed list, suppression list, etc.
- Charts and an extensive view of Campaign activities

### Inbound Email

- Conversion of emails to cases, leads, contacts, and bugs
- Support for POP3 and IMAP with SSL
- Configurable FROM email address for sent mail

### UI Enhancements

Significant user interface enhancements are available in Sugar Suite 4.0. The following lists the more notable UI enhancement changes:

- The Home Page now contains an area for the user's My Inbox. My Inbox is populated by items from the new Inbound Email feature.
- Opportunities: The Sales Stage dropdown values now determine the default value for Probability.
- Account: The detail view has a "Copy to Contacts" action which allows you to propagate the Account Bill-to or Ship-to address for selected Contacts. To do so, click the button and identify the contacts associated with the account in the popup. The address fields are propagated.
- Quick Search: The Quick Search feature performs immediate data lookups based on keystroke entries. Matching values are presented in dropdowns adjacent to the field for selection. Typing any character in the field presents a list. Typing additional characters restricts the resulting list. The Quick Search feature is available on any edit field that has a Select button next to it.
- Number Field Search: In the list view for the Bug Tracker and Cases modules, you can search the number field with a list of comma delimited values. For example, you can search for case numbers that are equal to 2630, 2489, or 2690.
- Popups: The popups accessed via the sub-panel Select buttons are multi-select popups. This feature promotes rapid association of multiple records, for example, multiple contacts under an Account.
- Data popups automatically show detail information when you pass over a row in the list view.
- Themes can be changed within the Sugar Suite application.
- The description field within detail views allows clickable URLs. A new browser window is generated.

## Changes since Sugar Suite 4.0.0

The following itemizes enhancements and behavior changes that were implemented between the 4.0.0 and 4.0.1 releases. Bug fixes are listed in a separate section.

- After a new module is uploaded it is viewable by all users by default.
- When sending an email to a contact using an email template, a salutation is no longer required.
- Attachments are available for email templates.
- Campaign Management allows suppression based on both target ID and email addresses.
- Project names can be displayed on a custom report for project tasks.
- A Mass Update button is added in My Inbox to archive your emails.
- A Mass Update option is available for custom fields through Studio.
- A bug number field is available with email notifications.

## Compatibility Matrix

SUGAR BUILDING BLOCKS	SUPPORTED VERSIONS	EXCEPTIONS	COMMENTS
PLATFORM			
LINUX	<i>Any flavor of Linux ( Ex : RHEL 4.0 )</i>		Sugar runs on all versions that run PHP
WINDOWS	<i>2K, XP, 2003</i>		
MAC OS	<i>X</i>		
PHP	<i>4.3.1 - 4.3.11</i>	<b>4.3.12</b>	Compatibility issues
	<i>4.4.1</i>	<b>4.4.0</b>	Compatibility issues
	<i>5.0.1 - 5.0.4</i>	<b>5.0.5</b>	Compatibility issues
DATABASE			
MYSQL	<i>4.0.x,</i>		
	<i>4.1.x</i>		
	<i>5.0.x</i>		Supported
WEB SERVER			
APACHE	<i>1.3.x, 2.0.x</i>		Supports any version that runs PHP
IIS	<i>4.0 , 5.0</i>		Supports any version that runs PHP
Outlook Plug-In	<i>Outlook 2000, Outlook 2002(XP), Outlook 2003</i>		
Word Plug-In	<i>Office 2003, Office XP</i>		
Client( Browser )	<i>latest Mozilla</i>		
	<i>latest Firefox</i>		
	<i>IE 6.0</i>		

Recommended Stack			
			The recommended stack is the version of the components on which SugarCRM has tested and verified all functionality.
OS Version	Any version supporting PHP		
PHP version	4.3.11		
MySQL database	4.1.15		
Apache	2.0.x		

## Known Limitations

Please check the Bug Tracker at <http://bugs.sugarcrm.com/> for known issues associated with this Sugar Suite 4.0 release.

- For data popups and quick searches to work after upgrading, you must clear your browser cache.
- Version 4.0 Campaign History records. Certain data in the pre-4.0 versions of Campaign Management is technically oriented and is not converted to Sugar 4.0 Campaign History records, which are more readable.
- Seed Data for certain users contains too much data. A large amount of the data has 1999-12-31 as the appointment due date.
- If you have two users with the same email address neither user's free/busy information will be available to Outlook or other calendar applications. This is because the correct user's free/busy information is found based on the email address. If there are two user records with the same address, no results are returned for any user.
- In Inbound Email, if an inbound email reply is saved as a draft rather than immediately sent, and later that draft is sent, there is a possibility that the draft reply will not be associated with the original Case.
- Beginning with Sugar Suite 4.0, the Module Loader is used exclusively to extend Sugar functionality with the addition of new modules. The Upgrade Wizard is used for all other modifications to the core application: new themes, language packs, as well as upgrades and patches.
- Sugar Plug-In for Word (Mail Merge) allows you to specify Accounts, Cases, Contacts, Leads, and Opportunities from within Sugar Suite and to merge the data with MS Word documents. Mail Merge invoked from within Sugar Suite supports Internet Explorer and Firefox browsers. An ActiveX plug-in is used to invoke and communicate with Word when Internet Explorer is used; an alternative method is used for Firefox.

Firefox users must allow popups to appear originating from their Sugar site URL. To do this, use the Tools option in Firefox and select the Options menu. The Block Popup Windows area can be used to exclude the Sugar site URL.

- In order to preserve potentially important campaign data the old data can be found in the emailman\_sent\_ table in your database. This table will be discarded in a future Sugar upgrade.
- Sugar Suite 4.0 does not support the UTF-8 character set.
- Sugar Suite's Inbound Email feature requires mailboxes to be established in Admin > Monitor New Mailbox. In this screen you can specify the following protocols: IMAP, IMAP-SSL, POP3 and POP3-SSL. These protocols in turn require ports to be open: IMAP, 143; IMAP-SSL, 993; POP3, 110; and POP3-SSL, 995.
- Modifications made to ACLs via the Admin > Role Management function, or Roles added to or deleted from Sugar users, will not take effect until the Sugar user next logs in.

## Bugs Fixed in this Release

The following lists the bugs fixed in this 4.0.1 release of Sugar Suite 4.0.

Number	Category	Subject
	Other	JavaScript errors. (3873, 3876, 3932, 4039, 4012, 4062, 4109)
	Other	Daylight Savings Time issues. (4030, 4050, 4066)
	Other	A sporadic problem occurs where users are being forced back to the login or time zone designation page after they have logged in or established the time zone. (4004, 4128)
1361	Bug Tracker	SCHEMA SWEEP: Identify and rename any Sugar schema items that conflict with supported databases.
2585	Calendar	An individual uninvited to a meeting still shows up in the shared calendar.
2607	Emails	Expanded view (full screen) not working when creating HTML emails.
2752	Install	Installation system check fails if the session variables become unavailable part-way through the install.
2757	Wireless	A meeting time or a task due time get set back to GMT on a wireless client even when it is set to a local time zone on a Sugar server.
3140	Themes	The JavaScript calendar is inconsistent with the theme in sunset and other darker themes.
3292	User Interface	The QuickSearch popup is too "bright" against darker themes, like Final Frontier.
3337	Inbound Email	"Task" should be created from Inbound Email.
3350	Calls	Cannot remove the organizer from messages/calls.
3351	Emails	When an email is saved as a draft and then recalled, the subject field is empty.
3366	Inbound Email	Messaging during the test settings for Inbound Email is ambiguous.
3378	Inbound Email	Reply to an Inbound Email does not allow use of mailbox reply to name and address.
3427	Inbound Email	My Inbox and Group Inbox "date created" should be "date sent".
3474	Inbound Email	There is a huge performance hit with POP3 and large email accounts.
3561		requireSingleResult is deprecated.
3565		Product Catalog has Mass Update but no checkboxes.
3666	Inbound Email	Emails & Schedulers need a schema change to get Internationalization working.

3744	System Internal	There are some issues with the Sugar update process.
3776	Security	A define statement should be used to insure that only valid files are called via the web browser.
3815	Other	ACL matrix under My Accounts does not display module names.
3828	Security	Menu shortcut links (like Create Bug) may appear for modules for which access has been disabled (like Bug Tracker).
3829	Emails	You can reply to a "Sent" message that the User composed/sent.
3868	Inbound Email	During Inbound Email setup Internet Explorer's required fields are identified as not required and subsequently fails queries.
3869	Employees	There is an incorrect query for the Employees module search.
3879	Inbound Email	Scheduler spams the log with false "FATAL" errors.
3880	Inbound Email	If "Possible Actions" is set to "none", mail imports fail.
3883	Calendar	My Upcoming Appointments for tomorrow are being incorrectly highlighted as today.
3884		An error occurs when clicking Next on sub-panels in campaign (status) detail view.
3886	Tasks	Tasks lose relationships associated with contacts.
3889	Campaign Mgmt	The next button on the View Status sub-panel gives an error.
3890	Campaign Mgmt	Internet Explorer: The import target returns a JavaScript error.
3913	User Interface	Deprecated CSS is interfering with current CSS files.
3914	Inbound Email	Schedulers/Inbound Email needs to be able determine what port Sugar is running on.
3916	Activities	Date-driven items like Notes, Calls, Tasks, or Meetings that appear in sub-panels must have a sort order of "most recent first".
3921	Campaign Mgmt	Campaign email bounces when assigned to an incorrect account and contact.
3927	Tasks	There is an incorrect SQL statement associated with the Home Tasks screen.
3930	Campaign Mgmt	In the Campaign activity view, Message Queue issues a bug/warning message.
3938	Emails	Emails do not show "Assigned:" field when email is assigned to a Group User.
3944	Emails	Response to emails can cause a mail loop.
3946	Accounts	JavaScript error message causes Internet Explorer to drop out of the socket security layer (SSL).
3947	Tasks	Can't type names in Assigned To fields.
3954	Projects	\$where being built on wrong table.
3958	Calendar	Calendar does not show all registered activities.
3963	Activities	There is an incorrect URL address for project task assignments.
3968	Emails	Can't set the Date/Time sent when creating an archived email in 4.0.
3977	Emails	Emails sent to multiple contacts associates only the first contact with all the emails.
3980		The first column for ACL doesn't display the modules.
3993	Inbound Email	Inbound Email Lead Capture does not populate the Subject line when replying.
3999	Calls	An edited call drops notes.
4032	Users	Admin > Role Management > List Roles by User does not show the corresponding module.
4034	Mail Merge (Sugar side)	An error occurs when calling the json server.



4035	Install	Ensure that the memory check (memory_limit) specifies > 20M.
4041	Projects	In the Project Tasks list, sort by owner does not work correctly.
4045	Studio	Selecting a sub-panel in Studio displays a blank page.
4046	Studio	Sub-panel edits in Studio overwrites changes with data from a previous task.
4047		Songs module shows a fatal error when saving and viewing.
4048	Projects	Prior date logic is not correct.
4056	Emails	The Group Inbox Mass Update delete capability fails in Inbound Email.
4057	Emails	Email Compose HTML area does not render in Internet Explorer 6.
4058	Emails	Any detail view of an email, if it is not "Archived" has a title "Sent Emails."
4063	Emails	An error occurs when canceling an email template.
4069	Projects	The query that builds the Project Tasks in the User's Home doesn't check to see if the project is deleted.
4078	Inbound Email	The Group Inbox search for Assigned To does not sort alphabetically.
4095	Inbound Email	Inbound Email does not handle encoding types for email.
4102	Emails	GUID of attachment is sent with email attachment file names.
4112	Inbound Email	Inbound Email does not import CC and BCC fields.
4119	Schedulers	Schedulers refreshJobs() stopping Schedulers from running.
4194	Opportunities	Opportunities should not allow a value greater than 100%.
4199	Campaign Mgmt	Navigation in Campaigns errors when viewing bounced messages.
4213	Calls	With non-English language packs, the call direction value in list view is not displaying.
4272	Employees	The search capability for the Employees module does not work properly.
4368	Opportunities	A JavaScript error occurs when deleting opportunity records.
4369	Email Campaigns	A JavaScript error occurs when canceling Email Campaign Settings.