

# **CloudSuite CRM**

## Release Notes

Version 3.12.0  
D54658-01  
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# 1 Introduction

## Document Purpose

This document details the features, enhancements, bug fixes, security updates, upgrade instructions, and known issues introduced in CloudSuite CRM version 3.12.0. It is intended to inform and support users and administrators through the update process.

## Audience

This release notes document is intended for:

- System administrators and IT teams
- End users of CloudSuite CRM
- Integration partners and developers.

## Revision History

The following table summarizes the version history, authorship, and key updates to this document.

Version	Date	Author	Description
1.0	2025-07-17	Satya Sai Pasupuleti	Initial Release

**Note:** Confidential – For internal use or sample portfolio presentation only.

## 2 Overview

CloudSuite CRM 3.12.0 delivers advanced AI-enabled features, enhanced security, significant workflow improvements, and critical bug fixes. This update is designed to boost user productivity, modernize administrative capabilities, and provide stronger data protection across the platform.

Key highlights of this release include:

- AI-powered lead scoring to prioritize sales opportunities.
- Customizable dashboard widgets for personalized user experiences.
- Enhanced onboarding with in-app guided walkthroughs.
- Multi-factor authentication (MFA) for increased security.
- Streamlined import workflows and modernized template editors.

CloudSuite CRM continues to evolve based on user feedback and market trends, ensuring its feature set remains relevant for businesses of all sizes. In this release, the integration of artificial intelligence further empowers sales teams to focus on high-value prospects, while improvements to user personalization and onboarding accelerate return on investment for new customers.

Security remains a top priority, expanded MFA support and robust data validation help safeguard sensitive information and meet compliance standards for enterprise environments. Together, these enhancements offer a balance of powerful new capabilities and core reliability.

For detailed information on added features, improvements, security updates, and deprecations, please refer to the subsequent sections of this document.

## 3 What's New

This section details the key new features, enhancements, updates, security changes, and deprecations introduced in CloudSuite CRM 3.12.0. All items are grouped for clear traceability and fast reference.

### Added Features

The following features have been newly introduced in this release to improve productivity, security, and user experience:

- **AI-Powered Lead Scoring:**  
Machine learning models automatically evaluate and rank leads, helping sales teams focus on the most promising opportunities.
- **Customizable Dashboard Widgets:**  
Users can personalize their dashboards using drag-and-drop widgets, saving preferred layouts for fast, individualized access.
- **In-App Guided Walkthroughs:**  
Interactive onboarding and tutorial flows accelerate learning of new features and improve user adoption.
- **Multi-Factor Authentication (MFA):**  
Support for TOTP (Time-based One-Time Password) and SMS code verification to enhance account security.

### Changed Features

The following existing functionalities have been enhanced or modified in this release:

- **Contact Import Workflow:**  
Updated with real-time progress indicators, improved error messaging, and enhanced mapping for custom fields.
- **Email Template Editor:**  
Modernized interface featuring rich text editing, snippet insertion, real-time preview, and better accessibility.
- **API Rate Limits:**  
Adjusted thresholds to improve system performance and reliability. Refer to the developer documentation for updated values.

### Fixed Bugs

The following issues identified as bugs in previous versions have been resolved:

- Calendar synchronization for recurring events now works reliably in all supported time zones.
- Export of large custom reports (over 10,000 rows) completes successfully without intermittent errors.
- Notification badges in the mobile app now clear correctly after messages are viewed.

- Role-based access for team dashboards displays the correct content per assigned permissions.

## Security Updates

- Patched a cross-site scripting (XSS) vulnerability in user profile image uploads.
- Session timeouts have been shortened to reduce unauthorized session risks.
- All inputs to the feedback form are now thoroughly validated to protect against injection attacks.

## Deprecated Updates

- **Legacy Email Reports:**  
The classic scheduled email reports feature is currently being phased out and will be removed in version 4.0. All users should migrate to the Automated Insights feature by September 2025.

## 4 Upgrade Notes

This section provides detailed guidance to help users and administrators prepare for, execute, and validate the CloudSuite CRM 3.12.0 upgrade. Following these notes will ensure a secure, smooth transition with minimal disruption.

### Pre-Upgrade Preparation

Before beginning the upgrade, complete these preparatory steps to ensure data integrity and a seamless process:

- Back up all custom data, generated reports, and connected third-party integrations, in accordance with your organization's IT policies.
- Review these release notes and change logs to familiarize yourself with new features, deprecated components, and resolved issues.
- Notify all users of the planned upgrade window and estimated downtime.
- Ensure all users have their latest contact information (especially for MFA).
- Verify that server environments meet the minimum system requirements for version 3.12.0, including OS version, browser support, and available disk space.

### Upgrade Process

The upgrade process introduces a brief service interruption and activates new security features. Follow these steps to upgrade to CloudSuite CRM 3.12.0:

1. Log in to the CloudSuite CRM admin portal and navigate to System Administration > Updates.
2. Click Check for Updates and confirm that version 3.12.0 is available.
3. In the Updates panel, select Upgrade to 3.12.0.
4. Review and accept the End User License Agreement (EULA) and release notes summary when prompted.
5. Click Proceed with Upgrade to initiate the update. Do not close the admin portal while the upgrade is in progress. (Expected duration: 10–30 minutes.)
6. Monitor the progress bar and system logs for any error messages.
7. After the upgrade completes, the system will automatically restart all CRM services.
8. Log back into the admin portal and verify that version 3.12.0 is active.
9. Notify all users that the system is available, and they may proceed with login and any required MFA setup.

### Post-Upgrade Tasks

After completing the upgrade to CloudSuite CRM 3.12.0, administrators should perform the following tasks to ensure the system's stability and integrity:

- Review user role assignments and permissions, as new default groups and updated access controls may affect existing configurations.
- Validate all integration points and API connections; update or regenerate API keys if API rate limits or third-party access require it.

- Confirm users are accessing CloudSuite CRM through supported browsers (Microsoft Edge, Google Chrome, or Mozilla Firefox); Internet Explorer 11 is no longer supported.
- Check that custom dashboards, notification settings, workflows, scheduled jobs, and automated backups are functioning as expected.
- Communicate the successful completion of the upgrade, highlighting any relevant updates or actions, to all users.

## Troubleshooting & Support

If any issues are encountered during or after the upgrade, administrators should take the following actions:

- For login or connectivity problems, clear the browser cache and attempt to log in again.
- If API integrations or webhooks fail to function, re-register the webhooks and generate new API keys as required.
- Report any discrepancies in data migration, dashboard layouts, or account access through the CloudSuite CRM support portal for prioritized assistance.
- For urgent or unresolved issues, contact [support@cloudsuitecrm.com](mailto:support@cloudsuitecrm.com) for direct help.
- Refer to the in-app support resources and knowledge base articles for additional troubleshooting guidance and best practices.

These upgraded instructions aim to ensure a controlled, positive experience as your organization transitions to CloudSuite CRM 3.12.0. For further help, see the Feedback and Support section of this document.



## 5 Known Issues

The following issues have been identified in CloudSuite CRM 3.12.0. Where applicable, workarounds or information about upcoming fixes are also provided.

- **Intermittent delays in real-time dashboard collaboration** may occur for users with high-latency or unstable internet connections. Performance improvements are in development for a future release.
- **Merge tags in legacy email templates** might display as placeholders in certain configurations. This is scheduled to be addressed in patch release 3.12.1.
- **Some third-party plugin icons** may not appear correctly due to an ongoing CDN migration. This visual issue does not affect plugin functionality.
- **File uploads larger than 500MB** can sometimes time out on slower network connections. For critical uploads, use a stable, high-speed connection or split files as a temporary workaround.
- **Occasional notification misfires** on mobile devices have been reported when switching frequently between networks. Users are advised to log out and back in to restore notifications if needed.

If you encounter additional problems not listed above, please report them via the support portal or contact your system administrator for further assistance.

## 6 Feedback and Support

We value user feedback and provide multiple support channels to ensure a positive experience with CloudSuite CRM 3.12.0. Please use the following resources for assistance, reporting issues, or sharing suggestions:

- **In-App Feedback Form:** Submit comments, feature requests, or bug reports directly through the feedback module within the CloudSuite CRM interface.
- **Support Portal:** Access troubleshooting guides, FAQs, and raise support tickets for technical issues at CloudSuite CRM Support Portal (replace with actual link).
- **Email Support:** For critical or unresolved issues, contact our technical support team at [support@cloudsuitecrm.com](mailto:support@cloudsuitecrm.com).
- **User Forums:** Join the community forums to share best practices, discuss enhancements, and connect with other CloudSuite CRM users.
- **Product Updates:** Stay informed about future releases, maintenance schedules, and planned improvements by subscribing to our product newsletter (settings available in your profile).

Your input helps us continuously improve CloudSuite CRM. We encourage you to report any concerns or suggestions so we can better support your organization's needs.