



Sugar Suite 4.0 Professional/Enterprise

BETA Release Notes

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Overview

Welcome and thank you for participating in the SugarCRM Beta process! This Release Notes document describes the features and capabilities of Sugar Suite 4.0 and pertains to the Beta release. Please spend some time on this Beta release as we continue to develop Sugar Suite 4.0 functionality for the upcoming General Availability release (mid-December).

So far, we have had four successful Community Previews:

- Community Preview (CP) #1, Monday, October 24th for SugarCRM's tester community.
- CP #2, Monday, November 7th for SugarCRM's tester community.
- CP #3, Thursday, November 10th for a subset of the SugarCRM's tester community to test installation processes.
- CP #4, Monday, November 21st targeted the entire SugarCRM open source and customer community.

Sugar Suite 4.0 Beta, beginning Wednesday, November 30th, 2005, targets the entire SugarCRM open source and customer community and includes full installation and upgrade capabilities.

We will continue to work as quickly as possible 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 the upcoming releases.

You can provide feedback in two ways:

- Via the SugarCRM Bug Portal, accessible through <http://bugs.sugarcrm.com>. Please use 4.0-Beta to designate bugs found in this community preview.
- Via a forum called "Community Preview" at <http://forums.sugarcrm.com>.

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

Features List

Sugar Suite 4.0 Beta Professional and Enterprise functionality includes:

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

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: Sales Stage dropdown values now determine the default value for Probability.
- Account: DetailView has a "Copy to Contacts" action which allows you to propagate the Account Bill-to or Ship-to address for selected Contacts.
 1. Click the link.
 2. In the popup, identify the contacts associated with the account.
 3. The address fields will be propagated.
- 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 in EditView.
- Number field search capability: In the ListView 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.
- Select popups accessed via 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 ListView.
- Themes can be changed within the Sugar Suite application.
- The DetailView allows URLs in the description field that are clickable for navigation purposes. A new browser window is generated.

Changes Since Community Preview #4 (CP4)

Campaign Management

- Many to many relation between emails and prospect list
- Independent scheduling of email messages
- Configurable email-man settings - ex defining number of emails to be processed at a time

Inbound Email

- Support for POP3
- Support for SSL
- Configurable FROM email address for sent mail

UI Revamp and Enhancements for ACL and Mail Merge

The Sugar Suite 4.0 user interface has undergone extensive revamping to incorporate ACLs and Mail Merge features.

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> | 4.3.12 | Compatibility issues |
| | <i>4.4.1</i> | 4.4.0 | Compatibility issues |
| | <i>5.0.1 - 5.0.4</i> | 5.0.5 | Compatibility issues |
| DATABASE | | | |
| MYSQL | <i>4.0.x,</i> | | |
| | <i>4.1.x</i> | | |
| | <i>5.0.x</i> | | Not available in 4.0 Beta. Available in Sugar Suite 4.0 GA |
| ORACLE | <i>9i</i> | | Not available in 4.0 Beta. Available in Sugar Suite 4.0 GA Oracle10 g is not a 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 plugin | <i>Outlook 2000, Outlook 2002(XP), Outlook 2003</i> | | |
| Client(Browser) | <i>latest Mozilla</i> | | |
| | <i>latest Firefox</i> | | |
| | <i>IE 6.0</i> | | |

| Recommended Stack | | | |
|-------------------|----------------------------|--|---|
| OS Version | Any version supporting PHP | | Recommended stack is the version of the components on which SugarCRM has tested and verified all functionality. |
| PHP version | 4.3.11 | | |
| Database | | | |
| MySQL | 4.1.15 | | |
| Oracle | 9i | | |
| Apache | 2.0.x | | |

MS Word and Sugar Preview Instances

To associate Microsoft Word with your Sugar installation, do the following

1. Access the new *SugarCRM* toolbar button.
2. Choose Settings.
3. Enter a demo username and password (e.g., “max” and “max”).
4. Specify the following URL: <http://preview.sugarondemand.com/yoursitename>
5. Press OK to close the dialog box and to login.

Mail Merge

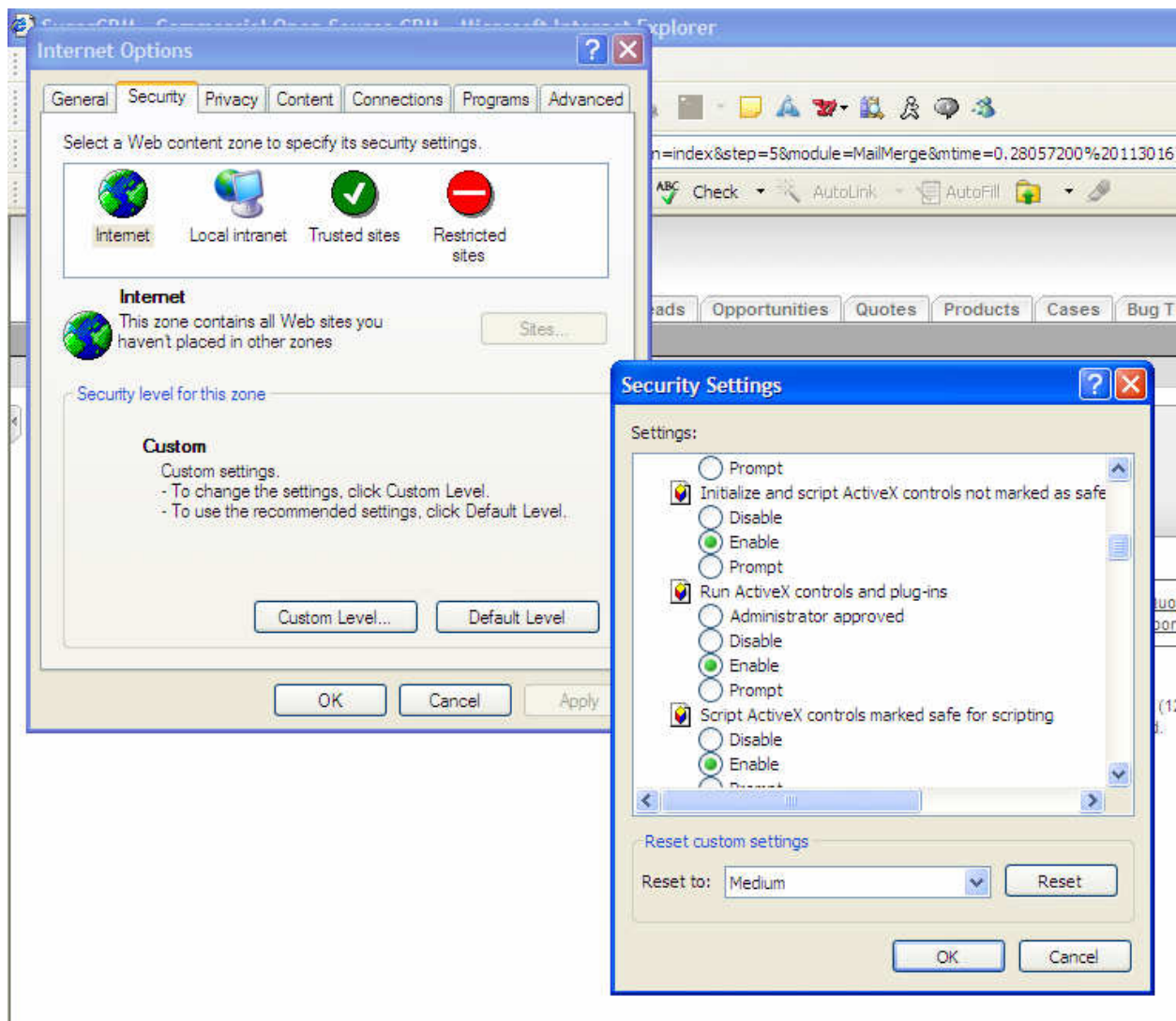
Please review the Known Issues for other restrictions regarding the use of Mail Merge in this Beta release. For information on how to use Sugar Mail Merge, see the *Sugar Mail Merge User Guide*. You can find this document in the Sugar Suite Documents module.

The Sugar Plug-In for Word program is located at:

http://www.sugarcrm.com/crm/downloads/SugarCRM_Word_Plugin_4_0_0_Beta_Demo.zip

- You must be running Microsoft Internet Explorer 6.0 or greater in order to invoke Mail Merge from within Sugar Suite.
- Sugar Mail Merge uses an ActiveX control within Internet Explorer in order to invoke Microsoft Word. This requires that the “Initialize and script ActiveX controls not marked as safe” security setting be enabled. In Internet Explorer, use Tools > Internet Options > Security (tab). Click the Internet icon, then click “Custom Level...”. Scroll to the “Initialize and script ActiveX controls not marked as safe” setting, and click Enable.

A screenshot of the security setup options is shown here:



Known Limitations

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

- Offline Client and Wireless Client are not supported in this 4.0 Beta release. Both experience problems that prevent their successful use during this Beta release.
- If you have implemented Campaign Management in your 3.5.1x release, ensure that queued emails from existing email marketing campaigns have been run to completion before upgrading from 3.5.1x to 4.0.0. Access Admin->Mass Email Manager to ensure that the Queue is empty. If any items are in the queue use the "Send Queued Campaign Emails" button to process those items.
- 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.
- For data popups and quick searches to work after upgrading, you must refresh your browser.
- After an upgrade, you must perform Admin > Repair > Rebuild Relationships.
- There is no support for MySQL5 and Oracle9.