

Sugar Suite 4.0 Open Source

Release Notes



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Table of Contents

- Overview 1**
- Features List..... 1**
- Changes since Sugar Suite 3.5.1..... 2**
 - Campaign Management 2
 - Inbound Email 2
 - Reports and Charts 2
 - Workflow, ACLs, and Mail Merge 2
 - UI Enhancements 2
- Compatibility Matrix..... 3**
- Known Limitations..... 4**

Overview

Welcome and thank you for selecting Sugar Suite as your customer relationship management system. This Release Notes document describes the features and capabilities of Sugar Suite 4.0 and pertains to the General Availability (GA) release. Please continue providing feedback on this GA 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 two ways:

- Via the SugarCRM Bug Portal, accessible through <http://bugs.sugarcrm.com>. Please use 4.0 to designate bugs found in this release.

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
- Customizable Dashboards

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

Reports and Charts

- Support for date types in a chart
- New chart types such as pie chart
- Customized charts available on a personal Dashboard
- Better navigation from charts

Workflow, ACLs, and Mail Merge

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

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, Cases, and Quotes 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.

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>		Supported
ORACLE	<i>9i</i>		Supported Oracle10g 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 Plug-In Client(Browser)	<i>Outlook 2000, Outlook 2002(XP), Outlook 2003</i>		
	<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		

Known Limitations

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

- 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.
- For data popups and quick searches to work after upgrading, you must refresh your browser.
- 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.
- After upgrading to Sugar Suite 4.0 please be sure to run the Rebuild Relationships and Rebuild Extensions links under the Admin > Repair section of Sugar Suite. Doing so will ensure that all new Sugar functions are compatible with existing data. As a reminder, the system administrator

will see an administrative message indicating these actions should be performed when s/he logs into the system following the upgrade.

- 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.
- Sugar Suite may continue to display shortcut menu links for modules and actions disabled by ACL restrictions defined in the Admin > Role Management area. An example may be a shortcut menu "Report Bug" when the Bug Tracker module is disabled. Users associated with roles that restrict access to these modules and actions will still be unable to access the module or perform the action.