What to Expect When Upgrading to 7.9

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Overview

Upgrades to Sugar 7.9 are available or required for instances according to the following guidelines:

- Sugar 7.8.0.0, 7.8.0.1, 7.8.1.0, and 7.8.2.0 instances that are hosted on Sugar's cloud service and are not highly customized will be upgraded to 7.9.
- On-Site 7.8.0.0, 7.8.0.1, 7.8.1.0, and 7.8.2.0 instances have the option to upgrade to 7.9.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that there are some key features of 7.8.x which have been changed or are not available in Sugar 7.9.x. Some of the items that are unavailable in Sugar 7.9.x may be made available in a future release. To help provide you with the necessary information, this article covers what to expect when upgrading your instance from 7.8.x to 7.9.x. For information about differences between 7.7.x, 7.8.x, and 7.9.x please refer to the [7.9 Release Notes](#) specific to your Sugar edition.

Feature Disparity Between 7.8.x and 7.9.x

Sugar 7.8.x features that have been changed or are no longer available in 7.9.x are as follows:

Category	Feature	Sugar 7.8.x	Sugar 7.9.x
Advanced Workflow	Process Email Templates	Process Email Templates refer to module and field variables by their display labels.	Process Email Templates refer to module and field variables by their system names. As a result, templates created or edited in 7.7.x and 7.8.x may need to be updated after upgrading to 7.9.x.
	Round Robin team assignments	Advanced Workflow replaces the existing teams on	Advanced Workflow appends any new teams to the

		records that are assigned via round robin.	existing team set on records that are assigned via round robin.
Connectors	D&B Connector	The D&B connector allows users to search, view, and import key information for new and existing accounts as well as create a list of individuals (e.g. contacts) for import based on various search filter criteria (e.g. people, company location, industry, etc.).	The D&B connector will not be available after upgrading to 7.9.x. The DUNS, SIC Code, and D&B Principal ID fields will be retained.
Quotes	User Interface	The Quotes module uses the Legacy user interface.	The Quotes module uses the Sidecar user interface.
	Create Flow	When a user creates a quote, the Quick Create drawer is exposed and the user is directed to their previous page on save.	When a user creates a quote, they are immediately directed to the quote's full record view and remain on the quote's record view on save.
	Product Groups	Quoted line items and comments must be placed in groups.	Quoted line items and comments can be added to quotes as grouped or ungrouped entities.
	Unit Price	When a quoted line item is created based on an item from the Product Catalog, the Unit Price can be modified in the	Unit Price fields for line items based on a Product Catalog item cannot be modified.

		quote.	
	Quote PDFs	Quote PDFs may be downloaded or emailed from the quote's record view.	Quote PDFs may be downloaded from the quote's record view and from the Quotes subpanel on a related record (e.g. from the opportunity). The "Email PDF" option has been deprecated.
	Record Actions	Users can copy and merge quotes.	Copy, Merge, and Find Duplicates actions are not supported in 7.9.0.0.
Reports	List View Search Filter	Users can save search filters for reports in the Advanced Search panel.	The user's saved searches in the Advanced Search panel will not be preserved after upgrading to 7.9.x and will need to be re-created.
User Interface	Help	The context-sensitive Help dashboard is available on the home page and in Sidecar modules' intelligence pane. It includes the Help dashlet which provides a brief introduction to the current module as well as a link to the module's corresponding documentation. Users may click the Help icon in	The Help dashboard will not be available on the home page or in Sidecar modules' intelligence pane after upgrading to 7.9.x. The context-sensitive information can now be accessed in the help pane by clicking the Help link in Sugar's footer.

		Sugar's footer to open or close the Help dashboard.	
	Learning Resources dashlet	The Learning Resources dashlet is available to view and add on the home page and in Sidecar modules' intelligence pane. It includes links to Sugar University, Documentation & Support, and Community Forums, which provide access to additional learning resources.	The Learning Resources dashlet will not be available to view or add on the home page or in Sidecar modules' intelligence pane after upgrading to 7.9.x. The links to Sugar University, Community Forums, and Documentation & Support can now be accessed in the help pane by clicking the Help link in Sugar's footer.
	Tour	The Welcome to Sugar tour automatically launches upon initial login to show key features of the Sidecar user interface. Users can click the Tour icon in Sugar's footer to launch the tour anytime upon user request.	The Welcome to Sugar tour does not launch automatically. It can be launched from the home page by clicking the Help link in Sugar's footer then clicking "Tour" in the help pane.

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