

---

# **What to Expect When Upgrading to 9.1**

---

|   |   |
|---|---|
| <b>What to Expect When Upgrading to 9.1</b> .....                         | 3 |
| Overview .....  | 3 |
| Feature Disparity Between Spring '19 (9.0.x) and Summer '19 (9.1.x) ..... | 3 |
| Product Offerings .....   | 3 |
| User Interface .....  | 4 |
| Administration .....  | 4 |
| Cases .....   | 5 |
| SugarBPM .....  | 5 |

---

# What to Expect When Upgrading to 9.1

## Overview

Upgrades to Sugar 9.1 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 9.1.

For the upgrade, please keep in mind that there are some key features of 9.0.x which have changed or are not available in Sugar 9.1.x. Some of the items that are unavailable in Sugar 9.1.x may be made available in a future release. To help provide you with the necessary information, this article covers what to expect when your instance is upgraded from 9.0.x to 9.1.x.

For information regarding new functionality available in 9.1.x, please refer to the [9.1 Release Notes](#) specific to your Sugar product.

## Feature Disparity Between Spring '19 (9.0.x) and Summer '19 (9.1.x)

9.0.x features in the following categories have changed or are no longer available in 9.1.x:

- [Product Offerings](#)
- [User Interface](#)
- [Administration](#)
- [Cases](#)
- [SugarBPM](#)

Please refer to the sections below for further information on the changes.

### Product Offerings

With the Summer '19 release, SugarCRM is announcing three new product offerings: [Sugar Serve](#), [Sugar Sell](#), and [Sugar Market](#). This change affects how we present Support documentation, as you will see the additional Sugar products available as filters for our guides and articles and mentioned throughout the Support Site's pages as pertains to the new license types for these products. For more information on license types in Sugar, refer to the [User Management](#) documentation for Sugar 9.1.

---

## User Interface

The following 9.0.x User interface features have changed in 9.1.x:

| Feature           | Sugar 9.0 Behavior   | Sugar 9.1 Behavior  |
|-------------------|--|---|
| Branding          | SugarCRM and the Sugar application use a red and black cube logo.  | SugarCRM and the Sugar application use a three-layer, multicolored cube logo.   |
| Editable previews | An administrator must enable the "Edit in preview pane" feature via Admin > System Settings.   | "Edit in preview pane" is enabled by default and will be enabled on upgrade. The option can be disabled via <a href="#">Admin &gt; System Settings</a> .                |
| Shared dashboards | When a shared dashboard contains List View dashlets with custom filters applied, the dashlet will not return results as the user does not have access to the filter. | Custom filters applied to List View dashlets are shared with all members of the associated team(s) that have access to the shared dashboard.                            |
| Viewing records   | For tasks, cases, and opportunities, users can toggle between list view and activity stream view using the two buttons next to the module's search bar.              | Sugar Serve, Sell, Enterprise, and Ultimate users can toggle between list view, activity stream, and tile view using the three buttons next to the module's search bar. |

## Administration

The following 9.0.x Administration features have changed in 9.1.x:

| Feature   | Sugar 9.0 Behavior                              | Sugar 9.1 Behavior  |
|-----------|---|---|
| Licensing | One Sugar license type is applied to all users. | When an organization has purchased more than one product, such as Sugar Sell and Sugar Serve, users may be associated |

---

|  |  |   |
|--|--|---|
|  |  | with one or more product <a href="#">license types</a> via Admin > User Management. |
|--|--|---|

## Cases

The following 9.0.x Cases features have changed in 9.1.x:

| Feature        | Sugar 9.0 Behavior  | Sugar 9.1 Behavior  |
|----------------|---|---|
| Follow Up Date | Users can manually enter a date and time to follow up with the customer on a case based on the related account's service level. | Sugar Serve users can leverage the <a href="#">stock SugarBPM templates</a> which will automatically calculate the follow-up dates for new and in-progress cases based on their organization's Service Level Agreements (SLAs). |

## SugarBPM

The following 9.0.x SugarBPM features have changed in 9.1.x:

| Feature             | Sugar 9.0 Behavior                                  | Sugar 9.1 Behavior   |
|---------------------|---|--|
| Send Message events | All messages are sent from the system email address | Send Message events have a "From" field to specify the sender email account. This is a required field that should be populated for existing Send Message events the next time the event is opened. |

Last Modified: 2020-01-31 20:27:26