
What to Expect When Upgrading to 11.1 (Q3 2021)

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What to Expect When Upgrading to 11.1 (Q3 2021)

Overview

Upgrades to Sugar 11.1 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 11.1 (Q3 2021).

For the upgrade, please keep in mind that there are some features of 11.0 (Q2 2021) that have changed or are not available in Sugar 11.1.x. Some of the items that are unavailable in Sugar 11.1.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 11.0.x to 11.1.x.

For information regarding new functionality available in 11.1.x, please refer to the release notes specific to your Sugar product:

- [Sugar Sell 11.1 Release Notes](#)
- [Sugar Serve 11.1 Release Notes](#)
- [Sugar Ultimate 11.1 Release Notes](#)
- [Sugar Enterprise 11.1 Release Notes](#)
- [Sugar Professional 11.1 Release Notes](#)

Feature Disparity Between 11.0.x and 11.1.x

11.0.x (Q2 2021) features in the following categories have changed or are no longer available in 11.1.x (Q3 2021):

- [Administration](#)
- [Cases](#)
- [Contracts](#)
- [Dashboards and Dashlets](#)
- [Developer](#)
- [Documents](#)
- [Export](#)
- [Knowledge Base](#)
- [Leads](#)
- [Messages](#)
- [Portal](#)

- [SugarLive](#)
- [User Interface](#)

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

Administration

The following 11.0.x Administration behavior has changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Custom Fields	Custom currency fields will not display your preferred currency if the Show Preferred Currency setting is enabled in your user profile.	Custom currency fields display your preferred currency if the Show Preferred Currency setting is enabled in your user profile.
Repair	The "Expand Column Width" repair job in Admin > Repair can be run to provide a fix for some limitations of MSSQL when requiring multi-byte characters in the database.	The "Expand Column Width" repair job has been removed as it is no longer needed with the versions of Microsoft SQL Server supported by Sugar 11.1.x and higher.
Module Loader	If you install a package that causes the Sugar instance to become unusable, the package cannot be readily uninstalled to return the instance to a usable state.	If you install a package that causes the Sugar instance to become unusable, the package installation is automatically rolled back.

Cases

The following 11.0.x Cases behavior has changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Primary Contact	The Primary Contact field on a case record exists independently from the	The Primary Contact field on a case is kept in sync with the Contacts

	<p>case's Contacts subpanel.</p>	<p>subpanel when case updates are made after upgrading to Sugar 11.1. As a result, setting the primary contact also adds the contact to the subpanel and, conversely, the first contact related to the case is set as the primary contact.</p> <p>Cases created before upgrading are not automatically updated to sync the Primary Contact field and Contacts subpanel. If you wish to sync them, you must do so manually after upgrading. To sync the Primary Contact field to the subpanel, simply save the case, with or without making changes. To set one of the contacts in the subpanel as the primary contact, you must update the Primary Contact field directly and select the desired contact.</p>
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Contracts

The following 11.0.x Contracts behavior has changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
License Availability	The Contracts module is not available for use by Sugar Serve users.	The Contracts module can be added to the navigation and used by Sugar Serve users. To display the module on Sugar's navigation bar, administrators should

		drag and drop the Contracts module from the Hidden Modules column to the Displayed Modules column via Admin > Display Modules and Subpanels.
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Dashboards and Dashlets

The following 11.0.x Dashboards and Dashlets behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Record View dashlet	<p>Record View dashlets can display a tabbed view showing records related to the current one that the user is viewing.</p> <ul style="list-style-type: none"> • For single-record Record View dashlet tabs (e.g. This Account), the dashlet's header will display the record's name (e.g. ABC Company). • For List View dashlet tabs (e.g. Calls), the dashlet's header will display "Record View" if it is the first tab on the dashlet. • The List View dashlet tab does not display the related module's name in the dashlet's header. 	<p>When viewing Record View dashlets, the current tab that the user is on drives what is displayed in the dashlet's header.</p> <ul style="list-style-type: none"> • When a tab showing a single record (e.g. This Account) is selected, the dashlet's header will display the name of the record (e.g. ABC Company). • When a tab showing a list of related records (e.g. Calls) is selected, the dashlet's header will display the related modules name as follows: "Related {module name}" (e.g. Related Calls). • When switching between the tabs,

		the dashlet header will change dynamically based on the current tab the user is on.
	Users can change the Record View dashlet's name when configuring the dashlet.	Users cannot change the Record View dashlet's name. It is a read-only field that displays "Record View Dashlet" when the dashlet is in edit mode.
Interactions dashlet	The dashlet that shows related activity records is called "Interactions".	The dashlet that shows related activity records is called "Timeline".

Developer

The following 11.0.x Developer behavior has changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Logic Hooks	The web logic hook timeout is 1 second.	The web logic hook timeout is 10 seconds and can be overwritten via the <code>web_logic_hook_timeout</code> configuration in <code>config_override.php</code> .
TeamSecurity	TeamSecurity on MySQL uses an INNER JOIN to join <code>team_sets</code> .	TeamSecurity on MySQL uses <code>team_set_id IN [team_sets subquery]</code> with a special MySQL optimizer hint. To disable this approach and switch back to the INNER JOIN implementation, set config parameter <code>disable_subquery_optimizer_hint</code> to true.

Documents

The following 11.0.x Documents behavior has changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
User Interface	The Documents module uses the legacy user interface.	The Documents module has been updated to use the Sidecar user interface.

Export

The following 11.0.x Export behavior has changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Exporting multiselect and dropdown fields	When exporting records, the database value is shown for dropdown fields and the display label is shown for multiselect fields.	When exporting records, dropdown and multiselect fields have columns for both the database values and the display labels.

Knowledge Base

The following 11.0.x Knowledge Base features and behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Preview	When previewing knowledge base records in Sugar, the Body field does not display in the intelligence pane.	The body of the knowledge base article is visible in the intelligence pane when previewing knowledge base records in Sugar.

Leads

The following 11.0.x Leads features and behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
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Lead Conversion	Users can convert a lead from the lead's list view Actions menu or from the lead's record view Actions menu.	Users can convert a lead from the lead's list view and record view Actions menus, and Sugar Sell, Enterprise, and Ultimate users have the added option to convert a lead when viewing it in the Record View dashlet.
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Messages

The following 11.0.x Messages features and behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Relating people records	Messages can have one contact record related via the Contact field.	The Contact field is replaced with a Guests panel where contacts, leads, and users can be related to message records. Upon upgrade, existing Contact field values are copied into the Guests panel.
Subpanel	The Messages subpanel is not added to the related module's Record View layout.	All modules with a relationship to Activities have the Activities' subpanels (i.e., Calls, Emails, Meetings, Messages, Notes, and Tasks) added to the Record View layout.

Portal

The following 11.0.x Portal features and behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Configuration	All instances with portal enabled will show a self-	Admins can edit a portal setting to enable or

<p>signup form on the portal's login page.</p>	<p>disable external portal sign ups, which will always be disabled by default for new instances. If you are upgrading an instance to 11.1.0 or higher from version 11.0.x or lower, the signup form will remain enabled only if the instance had their portal enabled before the upgrade AND at least one contact configured for portal access.</p>
<p>The following portal settings are available to be configured in Admin > Sugar Portal > Configure Portal to update the search box, login page logo, and navigation bar logo:</p> <ul style="list-style-type: none"> • Enable search before opening a case • Logomark URL • Logomark Preview • Logo URL • Logo Preview 	<p>The search box, login page logo, and navigation bar logo settings are now configured in Admin > Sugar Portal > Theme Portal using the Portal Theme Preview page. This preview page replaces the logo and search settings that were available in Configure Portal in versions 11.0 and lower.</p>
<p>The Theme Portal page in Admin > Sugar Portal allows you to choose colors for several user interface elements.</p>	<p>The Theme Portal page in Admin > Sugar Portal has been revamped to let you not only choose colors but also customize even more aspects of the portal, such as logos, the banner, the search bar, and all dashlets. Some of these settings are only available in Sugar Serve.</p>
<p>In Sugar Serve, the portal Home page banner is a blue and purple photo of a computer.</p>	<p>In Sugar Serve, the default portal Home page banner is a solid blue gradient and can be set to</p>

		any image or color by an admin. If you would like to use the previous photo of a computer that was used in Sugar versions 11.0 and lower, a support-authorized contact for your organization can file a case with the Sugar Support team for assistance.
	Admins can update the border color and navigation bar color for the portal via Admin > Sugar Portal > Theme Portal. They can also select one color for portal buttons and link text.	Admins cannot update the border color and navigation bar color in the portal. However, they can select one color for buttons and a different color for link text in Admin > Sugar Portal > Theme Portal.
Cases	When portal users create a case, they can change the value of the Status field.	When portal users create a case, they are restricted from editing the value of the Status field.

SugarLive

The following 11.0.x SugarLive features and behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Administration	Administrators can edit existing dashlets in the Search tab when configuring the SugarLive layout.	The Search tab cannot be configured.
	SugarLive configuration of the Summary Panel displays Case and Contact in addition to any available fields to be added.	SugarLive configuration of the Summary Panel displays Guests and Related To in addition to the available fields to be added.

	The Contact tab in SugarLive comes with a default layout and can be customized by admin users.	The Contact tab in SugarLive has an updated default layout that will be applied to all instances that have not been customized by admin users.
Features and Layout	In SugarLive, users with a Serve license type can view the Contact and Case tabs.	In SugarLive, users with a Serve license type can view the Account, Contact, and Case tabs.
	The Summary Panel contains Contact and Case fields to relate records to the call or message.	The Summary Panel contains Guests and Related To fields to relate records to the call or message.
	The Link button, used to link records to a SugarLive call or message, is located in the lower right-hand corner of the Record View dashlet in the Detail panel during a SugarLive session.	The Link button, used to link records to a SugarLive call or message, is located in the header of Record views and Record View dashlets throughout Sugar during a SugarLive session.
Search	In SugarLive's Search tab, users can search for records in the Contacts and Cases modules within the respective Console List View dashlet.	In SugarLive's Search tab, users can search for records in the Contacts, Accounts, Leads, and Cases modules using full-text Elasticsearch.

User Interface

The following 11.0.x User Interface features and behavior have changed in 11.1.x:

Feature	Sugar 11.0 Behavior	Sugar 11.1 Behavior
Icons	The icons throughout Sugar for UI elements such as the Preview, Create, and Favorite options utilize the Font	The icons used in Sugar are from a proprietary font-based icon library, SugarIcon, which will replace the Font Awesome

	Awesome library.	library in an upcoming release.
Sugar Logo	The SugarCRM logos at the top and bottom of the screen are brightly colored.	The SugarCRM logos at the top and bottom of the screen are the streamlined, monochrome design representative of the new Sugar brand.

Last Modified: 2021-08-04 17:59:12