What to Expect When Upgrading to 10.0 (Q2 2020)

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Overview

Upgrades to Sugar 10.0 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 10.0 (Q2 2020).
- On-site 9.0.x instances have the option to upgrade to 10.0.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that there are some key features of 9.3 (Winter '20) or 9.0 which have changed or may no longer be available in Sugar 10.0.x. Some of the items that are unavailable in Sugar 10.0.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 or 9.3.0 to 10.0.x.

Please refer to the appropriate section of this page for your upgrade scenario.

- [Feature Disparity Between 9.3.0 and 10.0.x](#) : For customers who are upgrading to 10.0.x from 9.3.0
- [Feature Disparity Between 9.0.x and 10.0.x](#) : For customers who are upgrading to 10.0.x from 9.0.x

For additional information regarding new functionality available in 10.0.x, please refer to the [10.0 Release Notes](#) specific to your Sugar product. For assistance with upgrading an on-site instance, refer to the 10.0 [Installation and Upgrade Guide](#) and [Migration Guide](#).

Feature Disparity Between 9.3.0 and 10.0.x

9.3.0 (Winter '20) features in the following categories have changed or are no longer available in 10.0.x (Q2 2020):

- [Consoles](#)
- [Product Catalog](#)
- [SugarBPM](#)
- [Tile View](#)
- [User Interface](#)

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

Consoles

The following 9.3.0 console behavior has changed in 10.0.x:

Feature	Sugar 9.3 Behavior	Sugar 10.0 Behavior
Renewals Console column name	The Opportunities tab of the Renewals Console has a column titled "Likely/Best/Worst" that contains a visual representation of each opportunity's value.	The Opportunities tab of the Renewals Console has a column titled "Worst | Likely | Best" that contains a visual representation of each opportunity's value.

Product Catalog

The following 9.3.0 Product Catalog behavior has changed in 10.0.x:

Feature	Sugar 9.3 Behavior	Sugar 10.0 Behavior
Audit log for product catalog	The audit log is not available for the Product Catalog module.	The audit log is available for the Product Catalog module via the Record Actions menu.
Product catalog access	The Product Catalog, Product Categories, Product Types, and Manufacturers modules are available in the Products and Quotes section of the Admin panel for admins only.	The Product Catalog, Product Categories, Product Types, and Manufacturers modules are available for all users. Administrators can restrict user access to these modules via standard team and role restrictions.

SugarBPM

The following 9.3.0 SugarBPM behavior has changed in 10.0.x:

Feature	Sugar 9.3 Behavior	Sugar 10.0 Behavior
Process sequencing	When multiple processes targeting the same module are triggered at once, they are ordered oldest to newest based on their process definitions' Date Created field.	When multiple processes targeting the same module are triggered at once, they are ordered by the Run Order field on their process definitions in ascending order, with blank values last. To break ties, they are then ordered oldest to newest based on their process definitions' Date Created field.

Tile View

The following 9.3.0 Tile View behavior has changed in 10.0.x:

Feature	Sugar 9.3 Behavior	Sugar 10.0 Behavior
Field validation	Field validation rules for records are not enforced when moving tiles (records) from one column to another in tile view.	Field validation rules for records are enforced when moving tiles from one column to another, and a validation error will display if there is a required field that must first be completed before the tile can be moved into the new column.
Tile header and body fields	When configuring the Tile Options Header and Tile Options Body fields in Admin > Tile View Settings, only stock fields are available to add to be displayed in tile view.	Both stock and custom fields are available to add to the Tile Options Header and Tile Options Body fields to be displayed in tile view.
Tile view column header	When a new value gets added to a dropdown list that is being used as a tile view header, the new value immediately appears as a column header in the	When a new value gets added to a dropdown list that is being used as a tile view header, you will need to click "Save" in Admin > Tile View Settings in order

	tile view.	for the new value to appear as a column header in tile view.
Tile view column order	The tile view column headers appear in the order that the values are saved in the field's (e.g. Status) Dropdown Editor list and are not affected by the order shown in Admin > Tile View Settings.	The left-to-right order of the tile view column headers can be changed by dragging and dropping the values (e.g. Not Started, In Progress) up or down within the Available Values list in Tile View settings.
Tile view filter	The filter applied to the module's list view or tile view are independent of one another and does not apply across both views. The filter is also not preserved when youpreserved when you navigate away from the module.	Applying a filter to the tile view will automatically apply to the module's list view and vice versa and will continue to apply as you toggle between the Tile View tabs, switch between the module's list view and tile view, or navigate away from the module.

User Interface

The following 9.3.0 User Interface features and behavior have changed in 10.0.x:

Feature	Sugar 9.3 Behavior	Sugar 10.0 Behavior
Cookie consent	Sugar does not ask you to consent to the use of cookies in the application.	The first time you log in or whenever Sugar's privacy policy changes, Sugar asks you to consent to the use of cookies in the application.
Configuring the preview	The layout of a record's preview matches the layout of its record view.	The layout of a record's preview can be configured by an admin in Studio.
Dashboard limit	The maximum number of dashboards that can be listed under the Home	The maximum number of dashboards that can be listed under the Home

	module tab is 20.	module tab is 50.
Default field name placement	Field names are displayed above their field values on record view and this is not configurable.	Users have the option in their profile to configure where field names are placed in relation to their field values; the default is "Beside Field Value".
Empty field pills	Empty fields on record view are displayed as a field name and a blank value.	Empty fields on record view are represented by a single empty field pill.

Feature Disparity Between 9.0.x and 10.0.x

9.0.x features in the following categories have changed or are no longer available in 10.0.x:

- Administration
- Bugs
- Cases
- Notes
- Portal
- Product Catalog
- SugarBPM
- SugarIdentity
- User Interface

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

Administration

The following 9.0.x Administration features have changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Security	Sugar only supports basic authentication for Gmail and Microsoft Exchange when configuring the outbound system and/or user email accounts, which requires the	Beginning with version 10.0.3, Sugar supports OAuth2 connections to Google Mail and Exchange Online when configuring the outbound system email account, user email

	username and password information to be entered to connect to the mail provider.	accounts, as well as inbound email accounts. Customers with existing Google or Microsoft Exchange email configurations in Sugar are encouraged to update their email settings by configuring the Google or Microsoft connector via Admin > Connectors to re-establish their email accounts using the new Google/Exchange Online options as they are more secure. Eventually, both Google and Microsoft will end support for the "old" basic authentication access. For more information, refer to the announcements on [Microsoft Tech Community](#) and [G Suite Updates](#).
Job Scheduler	Stock schedulers may have end dates of December 31, 2020.	Upgraded instances to version 10.0.3 will have the end date values removed from stock schedulers that have an end date of December 31, 2020.
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 [license types](#) via Admin > User Management.

Bugs

The following 9.0.x Bugs module behavior has changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Display in Portal field	Disabled by default on records.	Enabled by default for new records. The administrator can reverse the default behavior by navigating to Studio > [module] > Fields and editing the default value for the field.

Cases

The following 9.0.x Cases features have changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 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 stock SugarBPM templates which will automatically calculate the follow-up dates for new and in-progress cases based on their organization's Service Level Agreements (SLAs).
Display in Portal field	Disabled by default on records.	Enabled by default for new records. The administrator can reverse the default behavior by navigating to Studio > [module] > Fields and editing the default value for the field.

Notes

The following 9.0.x Notes module behavior has changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Display in Portal field	Disabled by default on records.	Enabled by default for new records. The administrator can reverse the default behavior by navigating to Studio > [module] > Fields and editing the default value for the field.

Portal

The following 9.0.x Portal features and behavior have changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Portal registration	When a customer submits their portal registration form, a **lead** record is created in Sugar which then needs to be qualified and converted to a contact.	When a customer submits their portal registration form, a **contact** record is created in Sugar and its Lead Source is set to "Support Portal User Registration".
	The Sugar user assigns a username and password to the customer when activating their portal account.	Portal registrants choose their own username and password when signing up for Sugar Portal.
Adding notes	Notes are created in a flyover window in portal.	Notes are created using the full record view in portal.
Footer (UI)	The portal displays a footer at the bottom of the page with links to Support and an in-page Tour.	The portal does not display a footer or links to Support and Tour.
Global Search and Quick Create	The portal features Global Search and Quick Create functions.	Global Search and Quick Create are not available in the portal.
List views	List views have very limited search and	Portal users can search for and filter list-view

	configuration options.	results, configure the available columns, and use a Refresh button to reload the list view.
Module visibility	Admin can hide modules from the portal via Admin > Display Modules and Subpanels.	Admin must hide modules from showing in the portal by adjusting visibility in the Support Portal role. The settings in Admin > Display Modules and Subpanels do not apply to portal.
Portal user Record Actions menu	The user's profile record in portal includes an Actions menu with the "View Personal Info" option.	The user's profile record in portal does not have an Actions menu or the option to View Personal Info.
Sugar user names	The portal shows the name of the Sugar user who created, modified, or is assigned to a record.	The portal does not show the user who created, modified, or is assigned to a record, though the dates are still visible where applicable. The admin may choose to display the name of the Assigned To user via Admin > Sugar Portal.

Product Catalog

The following 9.0.x Product Catalog behavior has changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Audit log for product catalog	The audit log is not available for the Product Catalog module.	The audit log is available for the Product Catalog module via the Record Actions menu.
Product catalog access	The Product Catalog, Product Categories, Product Types, and Manufacturers modules	The Product Catalog, Product Categories, Product Types, and Manufacturers modules

	are available in the Products and Quotes section of the Admin panel for admins only.	are available for all users. Administrators can restrict user access to these modules via standard team and role restrictions.

SugarBPM

The following 9.0.x SugarBPM behavior has changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Process sequencing	When multiple processes targeting the same module are triggered at once, they are ordered oldest to newest based on their process definitions' Date Created field.	When multiple processes targeting the same module are triggered at once, they are ordered by the Run Order field on their process definitions in ascending order, with blank values last. To break ties, they are then ordered oldest to newest based on their process definitions' Date Created field.
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.

SugarIdentity

The following 9.0.x SugarIdentity features have changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 Behavior
Employee records	For instances that use SugarIdentity, selecting	For instances that use SugarIdentity, selecting

	the Create Employee option directs the admin to SugarIdentity in the Cloud Settings Console.	the Create Employee option keeps the admin in the Sugar application where they can create a new employee record.
	For instances that use SugarIdentity, certain employee fields (e.g. First Name, Last Name, Title) are read-only and must be edited in SugarIdentity via the Cloud Settings console.	For instances that use SugarIdentity, employee fields can be edited directly in Sugar.

User Interface

The following 9.0.x User Interface features and behavior have changed in 10.0.x:

Feature	Sugar 9.0 Behavior	Sugar 10.0 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.
Cookie consent	Sugar does not ask you to consent to the use of cookies in the application.	The first time you log in or whenever Sugar's privacy policy changes, Sugar asks you to consent to the use of cookies in the application.
Configuring the preview	The layout of a record's preview matches the layout of its record view.	The layout of a record's preview can be configured by an admin in Studio.
Dashboard limit	The maximum number of dashboards that can be listed under the Home module tab is 20.	The maximum number of dashboards that can be listed under the Home module tab is 50.
Default field name placement	Field names are displayed above their field values on record view and this is not configurable.	Users have the option in their profile to configure where field names are placed in relation to their field values; the default is

		"Beside Field Value".
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 <u>Admin > System Settings</u>.
Empty field pills	Empty fields on record view are displayed as a field name and a blank value.	Empty fields on record view are represented by a single empty field pill.
Feedback link	The Feedback link is available in Sugar's footer and allows customers to communicate their overall satisfaction with Sugar.	The Feedback link has been removed from the footer of the Sugar user interface.
Restricted fields	User is not restricted from viewing fields in Sugar based on license types.	Beginning with version 10.0.3, if a user does not have the required license type to view a particular field, the field value is replaced with a placeholder containing the text "License Required".
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.