What to Expect When Upgrading to 12.0 (Q2 2022)

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Overview

Upgrades to Sugar 12.0 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 12.0 (Q2 2022).
- On-site 11.0.x instances have the option to upgrade to 12.0.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that there are some key features of 11.3 (Q1 2022) or 11.0 (Q2 2021) which have changed or may no longer be available in Sugar 12.0.x. Some of the items that are unavailable in Sugar 12.0.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 11.0.x or 11.3.0 to 12.0.x.

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

- [Feature Disparity Between 11.3.0 and 12.0.x](#): For customers who are upgrading to 12.0.x from 11.3.0
- [Feature Disparity Between 11.0.x and 12.0.x](#): For customers who are upgrading to 12.0.x from 11.0.x

For additional information regarding new functionality available in 12.0.x, please refer to the [12.0 Release Notes](#) specific to your Sugar product. For assistance with upgrading an on-site instance, refer to the 12.0 [Installation and Upgrade Guide](#) and [Migration Guide](#).

Feature Disparity Between 11.3.0 and 12.0.x

11.3.0 (Q1 2022) features in the following categories have changed in 12.0.x (Q2 2022):

- [Additional Features](#)
- [Administration](#)
- [Cloud Drive](#)
- [DocuSign](#)
- [Emails](#)
- [Forecasts](#)
- [Hint](#)
- [Opportunities and Revenue Line Items](#)

- [Sugar Maps](#)
- [SugarPredict](#)
- [User Impersonation](#)
- [User Interface](#)

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

Additional Features

The following 11.3.0 feature availability has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
License-Restricted Features and Modules	Many sales-focused and service-focused features and modules were available to Sugar Sell, Serve, or Enterprise users only.	Many features and modules have been made available to Sugar Sell and Enterprise customers. For more information on all features available to your license, please refer to the [License Types Matrix](#) page in our Administration Guide. For more information on what is newly available for your license, please refer to the [Sugar Sell](#) or [Enterprise](#) Release Notes.

Administration

The following 11.3.0 Administration behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Activity Stream Purger scheduler	By default, the Activity Stream Purger scheduler is set to run on the hour when enabled.	By default, the Activity Stream Purger scheduler is set to run weekly on Sundays at 4:00 AM when enabled.

Cloud Drive

The following 11.3.0 Cloud drive behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior

Cloud drive access in Sugar	Connect to cloud drives using wDrive, which is a purchased add-on product.	Connect to cloud drives using the cloud drive feature built in to Sugar.

DocuSign

The following 11.3.0 DocuSign behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
DocuSign integration	DocuSign is a purchased add-on product.	DocuSign is integrated into Sugar.

Emails

The following 11.3.0 Emails behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Favorite and Preferred Sending Accounts	Users can favorite Outgoing Email Accounts to prioritize them in the "From" address field when composing an email. Favorite email accounts are in alphabetical order, followed by all other accounts in alphabetical order.	Users can mark an account as a favorite and/or a "Preferred Sending Account" to prioritize the account in the "From" dropdown when composing an email. Accounts that are marked as favorites and preferred sending accounts are at the top of the list, followed by accounts that are marked as favorites in alphabetical order, followed by preferred sending accounts in alphabetical order, followed by all other accounts in alphabetical order.

Forecasts

The following 11.3.0 Forecasts behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Forecasting worksheet	Users found the Forecasts	Updates to the Forecasts

| label changes | module worksheet to be overly complicated or not applicable for their sales and forecasting processes. | module column names, buttons, and worksheet header make for a better and more intuitive user experience for sales agents and managers. |

Hint

The following 11.3.0 Hint behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Sugar Hint functionality	Sugar Hint functionality is available as a paid add-on and installed via module loadable package.	Sugar Hint functionality is available in Sugar Sell Premier or as a paid add-on to Sugar Sell Advanced, Sugar Serve, or Sugar Enterprise and is enabled via license key in Sugar.

Opportunities and Revenue Line Items

The following 11.3.x Opportunities and Revenue Line Items behaviors have changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Sales stage classification	The classification (e.g., Open, Closed Won) for stock and custom sales stages (e.g., Value Proposition) can only be changed via the database.	Administrators can change the classification for stock and custom sales stages in Admin > Dropdown Editor by editing the desired sales stage and selecting the appropriate classification option (e.g., Closed Won).

Sugar Maps

The following 11.3.0 Sugar Maps behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Sugar Maps integration	Sugar Maps integration is a purchased add-on	Sugar Maps is integrated into Sugar.

	product.	

SugarPredict

The following 11.3.0 SugarPredict behavior has changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Stock SugarPredict fields will replace custom fields on upgrade.	Instances with SugarPredict enabled had custom Prediction fields created.	SugarPredict fields are available out of the box and will replace the custom Prediction fields that existed for customers with SugarPredict enabled. If any Prediction fields were added to reports or SugarBPM processes, they will need manually updated.

User Impersonation

The following 11.3.0 User Impersonation features and behavior have changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
Tracking changes in audit log	During the impersonation session, changes made in the user's account get logged as being made by the user and not the administrator.	Changes made by admin users during the impersonation session get logged as being made by the administrator. The Source column in the record's audit log will display the administrator's name next to a mask icon to indicate changes made by the admin.

User Interface

The following 11.3.0 User Interface features and behavior have changed in 12.0.x:

Feature	Sugar 11.3 Behavior	Sugar 12.0 Behavior
List View	Lists of records are displayed in one page with	Lists of records are displayed in multiple

	the "More..." link available at the bottom of the view to append the next set of records to the bottom of the list. It is not possible to jump to a specific set of records without loading all of the records before it.	pages with the pagination controls available at the bottom of the view to navigate to different pages of results. Users can enter a particular page number to jump to a specific set of records in the list.

Feature Disparity Between 11.0.x and 12.0.x

11.0.x (Q2 2021) features in the following categories have changed in 12.0.x (Q2 2022):

- [Additional Features](#)
- [Administration](#)
- [Calendar](#)
- [Calls and Meetings](#)
- [Cases](#)
- [Cloud Drive](#)
- [Contracts](#)
- [Convert Lead](#)
- [Dashboards and Dashlets](#)
- [Developer](#)
- [Doc Merge](#)
- [Documents](#)
- [DocuSign](#)
- [Emails](#)
- [Export](#)
- [Forecasts](#)
- [Hint](#)
- [Knowledge Base](#)
- [Leads](#)
- [Messages](#)
- [Notes and Attachments](#)
- [Opportunities and Revenue Line Items](#)
- [Portal](#)
- [Product Catalog](#)
- [Quotes and Quoted Line Items](#)
- [Record View](#)
- [Studio](#)
- [SugarLive](#)
- [Sugar Maps](#)
- [SugarPredict](#)
- [User Interface](#)

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

Additional Features

The following 11.0.0 feature availability has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
License-Restricted Features and Modules	Many sales-focused and service-focused features and modules were available to Sugar Sell, Serve, or Enterprise users only.	Many features and modules have been made available to Sugar Sell and Enterprise customers. For more information on all features available to your license, please refer to the License Types Matrix page in our Administration Guide. For more information on what is newly available for your license, please refer to the Sugar Sell or Enterprise Release Notes.

Administration

The following 11.0.0 Administration behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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	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.	instance to become unusable, the package installation is automatically rolled back.
Prune Tracker Tables scheduler	The Prune Tracker Tables scheduler is set to run at 2:00 AM on the first day of every month by default.	The Prune Tracker Tables scheduler is set to run daily at 2:00 AM by default.
Admin page	The Admin page uses legacy styling with an outdated UI and icons, help text on the screen, and no search bar.	The Admin page uses modern styling with a clean and uncluttered UI, help text in tooltips, refreshed icons, and a search bar to help you find specific pages.
	Admins can access the Admin page via the user menu in the top right corner of Sugar or by directly accessing the following URL: */#bwc/index.php?module=Administration.	Admins can access the newly modernized Admin page via the user menu in the top right corner of Sugar or by directly accessing the following URL: */#Administration. It is still possible to access the legacy-styled page by navigating to the legacy URL directly.
Content Security Policy Settings	The 'frame-ancestors' directive can only be modified in the database to add new domains or source values.	The 'frame-ancestors' directive can be configured via Admin > Content Security Policy Settings. Upon upgrade, any existing values defined for the 'frame-ancestors' directive will display in the Trusted Parent Domains ('frame-ancestors') field on the CSP Settings page.
Dropdown Conditional Layouts	When configuring record view layouts in Studio, administrators have the	The record view layout page in Studio has been re-designed to accommodate

	ability to define role-based views.	the added functionality of configuring dropdown-based views.
LDAP Encryption	When configuring the LDAP authentication in Admin > Password Management, the available options in the Encryption field are "TLS", "SSL", and "none".	The LDAP Encryption options have been renamed as follows: • **TLS**: Renamed to "StartTLS". • **SSL**: Renamed to "LDAPS".
Sugar Logic date/time calculations	Sugar Logic calculations resulting in a DateTime value are rounded up to the next 15-minute mark.	Sugar Logic calculations resulting in DateTime values are rounded down to the previous 15-minute mark.
Developer mode	Administrators can enable or disable Developer Mode via Admin > System Settings.	Administrators for instances running Sugar on-site can enable or disable Developer Mode via Admin > System Settings, but the setting is hidden for SugarCloud-hosted instances.
Proxy settings	Administrators can access the Proxy Settings section in Admin > System Settings.	Administrators for instances running Sugar on-site can access the Proxy Settings section in Admin > System Settings, but the section is hidden for SugarCloud-hosted instances.
Activity Stream Purger scheduler	By default, the Activity Stream Purger scheduler is set to run on the hour when enabled.	By default, the Activity Stream Purger scheduler is set to run weekly on Sundays at 4:00 AM when enabled.

Calendar

The following 11.0.x Calendar behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior

Calendar module converted to Sidecar	The Calendar module is a legacy module.	The Calendar module is a Sidecar module.
	The legacy Calendar module is opened by clicking on the Calendar module tab.	The legacy Calendar module is opened by clicking on the arrow on the Calendar module tab and selecting "Legacy Calendar".
	The iCal subscription URL for a calendar is found in Profile > Advanced > Calendar Options.	The iCal subscription URL for Calendar is found by clicking the Share button in the top right corner of the calendar view, then selecting "Publish iCal". Note that the old iCal subscription URL field is still visible in Profile > Advanced > Calendar Options but no longer works. Please update any old iCal links you may have been using to the new one.
Calendar First Day of Week setting	The First Day of Week setting in Profile > Advanced > Calendar Options is observed for legacy calendar only.	The First Day of Week setting in Profile > Advanced > Calendar Options is observed for legacy and Sidecar calendar.

Calls and Meetings

The following 11.0.x Call and Meeting modules features have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Invitation Body field in Calls and Meetings	In the Calls and Meetings modules, use the Description field to add a description of the event that is visible to all guests after clicking "Save and Send Invites".	In the Calls and Meetings modules, use the Invitation Body field to add a description of the event that is visible to all guests after clicking "Save and Send Invites".

Cases

The following 11.0.x Cases behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Primary Contact	The Primary Contact field on a case record exists independently from the case's Contacts subpanel.	The Primary Contact field on a case is kept in sync with the Contacts 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. 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.

Cloud Drive

The following 11.0.0 Cloud drive behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Cloud drive access in Sugar	Connect to cloud drives using wDrive, which is a	Connect to cloud drives using the cloud drive

| | purchased add-on product. | feature built in to Sugar. |

Contracts

The following 11.0.x Contracts behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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.

Convert Lead

The following 11.0.x Convert Lead behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Create multiple revenue line items during lead conversion	Users can create one revenue line item record during lead conversion.	Users can create multiple revenue line item records during lead conversion.

Dashboards and Dashlets

The following 11.0.x Dashboards and Dashlets behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Record View dashlet	Record View dashlets can display a tabbed view showing records related to the current one that the user is viewing. • For single-record Record View	When viewing Record View dashlets, the current tab that the user is on drives what is displayed in the dashlet's header. • When a tab showing a single

	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.	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 willl 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".
Product Catalog dashlet shortcuts	In the Product Catalog dashlet, click the card icon to view the record details and click the name to add it as a line item.	In the Product Catalog dashlet, click the Preview icon to view the record details and click the card icon or name to add the product as a line item.
Timeline dashlet	When looking at the Timeline dashlet, the Date	The Date Created (e.g., for notes and draft emails) or

	Modified value for the related activity displays to the left of the record card.	Date Sent (for archived emails) value displays to the left of the record card in the Timeline dashlet. The Date Modified value displays directly within the record card.
Dashlet Actions	A dashlet's Actions menu is persistently shown in the corner of the dashlet.	A dashlet's Actions menu is hidden from view until the user hovers their mouse over any part of the dashlet.
Product Catalog Quick Picks dashlet	In the Product Catalog Quick Picks dashlet, click the card icon to view the product catalog record's details prior to adding the product as a line item. Click the product's name from the dashlet to add it as a line item.	Hover over the product's name in the dashlet then click the preview icon to view the product catalog record's details. Click the card icon or the product's name from the Product Catalog Quick Picks dashlet to add the product as a line item.
Timeline Dashlet	When looking at the Timeline dashlet, the Date Created value displays to the left of the record card for the related calls, meetings, or messages.	When looking at the Timeline dashlet, the Start Date value displays to the left of the record card for the related calls, meetings, or messages.

Developer

The following 11.0.x Developer behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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 web_logic_hook_timeout configuration in config_override.php.
TeamSecurity	TeamSecurity on MySQL uses an INNER JOIN to join team_sets.	TeamSecurity on MySQL uses team_set_id IN [team_sets subquery] with a special MySQL optimizer

		hint. To disable this approach and switch back to the INNER JOIN implementation, set config parameter disable_subquery_optimizer_hint to true.

Doc Merge

The following 11.0.x Doc Merge behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Doc Merge	wDocs is a purchased add-on feature.	wDocs is integrated into Sugar Sell and Serve as "Doc Merge" and is available as an add-on for customers using Sugar Professional, Enterprise, or Ultimate. **Note**: For more information on comparing the two, please refer to the Understanding Doc Merge vs wDocs article.

Documents

The following 11.0.x Documents behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
User Interface	The Documents module uses the legacy user interface.	The Documents module has been updated to use the Sidecar user interface.

DocuSign

The following 11.0.0 DocuSign behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
DocuSign integration	DocuSign is a purchased add-on product.	DocuSign is integrated into Sugar.

Emails

The following 11.0.0 Emails behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Favorite and Preferred Sending Accounts	When composing an email, email addresses in the "From" dropdown are in alphabetical order.	Users can mark an account as a favorite and/or a "Preferred Sending Account" to prioritize the account in the "From" dropdown when composing an email. Accounts that are marked as favorites and preferred sending accounts are at the top of the list, followed by accounts that are marked as favorites in alphabetical order, followed by preferred sending accounts in alphabetical order, followed by all other accounts in alphabetical order.
Embedding image data in emails	Users cannot copy and paste the image data directly into the body of the email in the email composer.	Users can copy and paste the image data directly into the body of the email in the email composer.

Export

The following 11.0.x Export behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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.

Forecasts

The following 11.0.0 Forecasts behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Forecasting worksheet label changes	No changes were made to the Forecasts module.	Updates to the Forecasts module column names, buttons, and worksheet header make for a better and more intuitive user experience for sales agents and managers.

Hint

The following 11.0.0 Hint behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Sugar Hint functionality	Sugar Hint functionality is available as a paid add-on and installed via module loadable package.	Sugar Hint functionality is available in Sugar Sell Premier or as a paid add-on to Sugar Sell Advanced, Sugar Serve, or Sugar Enterprise and is enabled via license key in Sugar.

Knowledge Base

The following 11.0.x Knowledge Base features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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.
Knowledge Base record view layout	In the Knowledge Base module, the Templates button is above the Body field on the right side, the Attachments field is located below the Body field, and the Body field height does not adapt to the screen size in the	In the Knowledge Base module, the Templates button is on the Body field TinyMCE editor bar, the Attachments field is located under "Show More" in the record view, and the Body field height in the Create drawer

	Create drawer.	adapts to the screen size to provide a better authoring experience.

Leads

The following 11.0.x Leads features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
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.

Messages

The following 11.0.x Messages features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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 Actvities have the Activities' subpanels (i.e., Calls, Emails, Meetings, Messages, Notes, and Tasks) added to the Record View layout.

Notes and Attachments

The following 11.0.x Notes and Attachments behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Embedding image data in emails	Users cannot copy and paste the image data directly into the body of the email in the email composer.	Users can copy and paste the image data directly into the body of the email in the email composer.
Marking an outgoing email account as a favorite	The system outgoing email account is used as the default "From" address when composing an email.	The outgoing email account marked as a favorite is used as the default "From" address when composing an email.

Opportunities and Revenue Line Items

The following 11.0.x Opportunities and Revenue Line Items behaviors have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Opportunity Cascade values	When creating a new opportunity, revenue line item fields must be set individually.	When creating a new opportunity, a new field, Set Across Revenue Line Items, allows you to cascade the Expected Close Date, Sales Stage, Service Start Date, and Service Duration values down to the eligible corresponding revenue line item fields.
Sales stage classification	The classification (e.g., Open, Closed Won) for stock and custom sales stages (e.g., Value Proposition) can only be changed via the database.	Administrators can change the classification for stock and custom sales stages in Admin > Dropdown Editor by editing the desired sales stage and selecting the appropriate classification option (e.g., Closed Won).

Portal

The following 11.0.x Portal features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Configuration	All instances with portal enabled will show a self-signup form on the portal's login page.	Admins can edit a portal setting to enable or 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.
	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: • Enable search before opening a case • Logomark URL • Logomark Preview • Logo URL • Logo Preview	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.
	The Theme Portal page in Admin > Sugar Portal allows you to choose colors for several user interface elements.	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.

	In Sugar Serve, the portal Home page banner is a blue and purple photo of a computer.	In Sugar Serve, the default portal Home page banner is a solid blue gradient and can be set to 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.
Notes on portal records	Knowledge base articles and bugs show the list of their related notes at the bottom of record view in the Notes panel. The details of each note can be seen by clicking the Preview icon next to the note.	Knowledge base articles and bugs show the list of their related notes, including the full contents of each, at the bottom of record view. The details of each note are displayed directly within the list.
Case timeline in the portal	Cases show the list of their related notes at the bottom of record view in the Notes panel. The details of each note can be seen by clicking the Preview icon next to the	Cases show the list of related notes, emails, and messages, including the full contents of each, at the bottom of record view. The details of each record are displayed directly

	note. Emails and message are not displayed.	within the list.

Product Catalog

The following 11.0.x Product Catalog features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
New Status field	In the Product Catalog module, no status exists and any product can be related to another record (e.g., revenue line items) regardless of actual product availability.	In the Product Catalog module, a Status field designates which products are available and drives the results that appear in the Product Catalog dashlet, Product Catalog Quick Picks dashlet, and Product Catalog relate fields.
Currencies	When importing product catalog records, Sugar does not respect currencies that are different than the set system currency.	When importing product catalog records, Sugar will respect and display the currencies defined in the import file.

Quotes and Quoted Line Items

The following 11.0.0 Quotes and Quoted Line Items features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Tax Rate set by default	The Tax Rate field is not set by default. Instead, it must be manually selected for each quote record, otherwise, tax is not included.	When creating a new quote, the Tax Rate field is automatically set to the tax rate with the lowest order number available to the current user.

Record View

The following 11.0.x Record View behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior

Dropdown Conditional Layouts	While fields can be configured as dependent, the entire record view is not dependent upon them and you will not receive an alert.	When dropdown field-based layouts are configured, the record view may change dependent upon the value selected and you will receive an alert regarding the layout change.

Studio

The following 11.0.x Studio behaviors have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Convert Lead Layout	You can add Revenue Line Items as a module in the Convert Lead layout in Studio.	When you add the Opportunities module in the Convert Lead layout in Studio, you can choose to enable Revenue Line Items, set them as required, and copy lead data.
Mobile layouts for escalations	The default layouts for Mobile DetailView, EditView, and ListView contain only a few fields.	The default layouts for Mobile DetailView, EditView, and ListView contain fields that provide helpful insight into the state of the escalation, including the Reason, Status, and Description fields.

SugarLive

The following 11.0.x SugarLive features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 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	SugarLive configuration of the Summary Panel

	displays Case and Contact in addition to any available fields to be added.	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 thoughout 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.
Compact view	Compact view in SugarLive overlays the information you are viewing (e.g., list or record views) during a SugarLive session.	Compact view in SugarLive displays the information you are viewing (e.g., list or record views) on the right side of the Summary and Communication panels during a SugarLive session.

Sugar Maps

The following 11.0.0 Sugar Maps behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Sugar Maps integration	Sugar Maps integration is a purchased add-on product.	Sugar Maps is integrated into Sugar.

SugarPredict

The following 11.0.0 SugarPredict behavior has changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
Stock SugarPredict fields will replace custom fields on upgrade.	Instances with SugarPredict enabled had custom Prediction fields created.	SugarPredict fields are available out of the box and will replace the custom Prediction fields that existed for customers with SugarPredict enabled. If any Prediction fields were added to reports or SugarBPM processes, they will need manually updated.

User Interface

The following 11.0.0 User Interface features and behavior have changed in 12.0.x:

Feature	Sugar 11.0 Behavior	Sugar 12.0 Behavior
List View	Lists of records are displayed in one page with the "More..." link available at the bottom of the view to append the next set of records to the bottom of the list. It is not possible to jump to a specific set of records without loading all of the records before it.	Lists of records are displayed in multiple pages with the pagination controls available at the bottom of the view to navigate to different pages of results. Users can enter a particular page number to jump to a specific set of records in the list.
Icons	The icons throughout Sugar for UI elements	The icons used in Sugar are from a proprietary

	such as the Preview, Create, and Favorite options utilize the Font Awesome library.	font-based icon library, SugarIcon, which will replace the Font Awesome 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.
Dark theme	Sugar's out-of-the-box appearance is a Light theme without a Dark option.	Sugar introduces the Appearance field to user preferences and is set to "Use System Setting" by default, meaning that whatever theme (e.g., dark) your computer or device is set to use, Sugar will also use. Additionally, Sugar introduced a default "Dark mode" logo that admin users may want to replace under Admin > System Settings.