
What to Expect When Upgrading to 9.0

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What to Expect When Upgrading to 9.0

Overview

Upgrades to Sugar 9.0 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 9.0.
- On-site 8.0 instances have the option to upgrade to 9.0.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that some features that your instance uses may have changed or may be no longer available in Sugar 9.0.x. Some of the items that are unavailable in Sugar 9.0.x may be made available in a future release. This article covers what to expect when your instance is upgraded from 8.0.x or 8.3.x to 9.0.x.

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

- [Feature Disparity Between 8.3.x and 9.0.x](#) : For customers who are upgrading to 9.0.x from 8.3.x
- [Feature Disparity Between 8.0.x and 9.0.x](#) : For customers who are upgrading to 9.0.x from 8.0.x

For additional information regarding new functionality available in 9.0.x, please refer to the [9.0 Release Notes](#) specific to your Sugar product. For assistance with upgrading an on-site instance, refer to the 9.0 [Installation and Upgrade Guide](#) and [Migration Guide](#).

Feature Disparity Between 8.3.x and 9.0.x

Advanced Workflow is Now "SugarBPM™ Automation Suite"

Sugar's business process management tool known as "Advanced Workflow" is being rebranded as "SugarBPM" starting with Sugar 9.0.0. The SugarBPM automation suite still consists of four process-related modules that work together to automate complex business processes: Processes, Process Business Rules, Process Email Templates, and Process Definitions. The names of these modules are not affected by this shift in terminology.

This change primarily affects the administrator's user interface and does not affect functionality for the end user. In addition, developers can continue to utilize the PMSE* class elements without interruption. Please be advised that there may be some overlap in terminology on the [Sugar Support](#) site and in [SugarClub](#) as we

make this transition.

Other 8.3.x features that have changed or are no longer available in 9.0.x are as follows:

Category	Feature	Sugar 8.3 Behavior	Sugar 9.0 Behavior
User Interface	Login warning message	A warning message displays directly on the login screen if either the number of active users exceeds the license limit, the Sugar license has expired/is due to expire, or the system is undergoing scheduled maintenance.	The warning message now displays once the user attempts to log in to Sugar.

Feature Disparity Between 8.0.x and 9.0.x

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

- [Advanced Workflow](#)
- [Administration](#)
- [Data Privacy](#)
- [Quotes](#)
- [Quoted Line Items](#)
- [Reports](#)
- [Scheduled Reports](#)
- [User Interface](#)

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

Advanced Workflow

Advanced Workflow is Now "SugarBPM™ Automation Suite"

Sugar's business process management tool known as "Advanced Workflow" is being rebranded as "SugarBPM" starting with Sugar 9.0.0. The SugarBPM automation suite still consists of four process-related modules that work together to automate complex business processes: Processes, Process Business Rules, Process Email Templates, and Process Definitions. The names of these modules are not affected by this shift in terminology.

This change primarily affects the administrator's user interface and does not affect functionality for the end user. In addition, developers can continue to utilize the PMSE* class elements without interruption. Please be advised that there may be some overlap in terminology on the [Sugar Support](#) site and in [SugarClub](#) as we make this transition.

The following 8.0.x Advanced Workflow features have also changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Process Validation	When using the Visual Designer to create a Process Definition, real-time sequencing errors are displayed to the right of the design canvas in the Element Errors panel.	When using the Visual Designer to create a Process Definition, sequencing errors and configuration warnings are displayed below the design canvas in the Process Validation panel. Instead of giving real-time feedback, the validator runs at admin-specified intervals (every 30 seconds by default).
Importing and exporting process definitions	Process definitions and their related email templates and business rules must be exported separately and imported in a particular order.	When exported, process definitions will bundle their related email templates and business rules in the .bpm file package. On import, the admin user can determine which of the packaged collateral records they want to import.
Scheduler	The Advanced Workflow Scheduled Job is required for processing Wait events, Receive Message events, and Send Message (intermediate) events.	The Advanced Workflow Scheduled Job has been renamed "SugarBPM Scheduled Job" and is required for processing Wait events, Receive

	Send Message End events are direct-send and do not wait for cron to cycle.	Message events, Send Message events, and Send Message End events.
Start events	When a module field evaluation is performed in a Start event against a module that has a many-type relationship to the process definition's target module (e.g., evaluating the opportunities related to an account), the Start event will only evaluate the last-modified record (e.g. the most recently modified opportunity related to the account).	When more than one related record may be affected by a process definition's Start event, the administrator can specify if the criteria must be true for all related records or just one or more of the related records. Existing process definitions will continue to evaluate only the most recently modified record until an administrator updates the Start event's criteria.
End events	Send Message end events will send a message to recipients one time.	Send Message end events will send a separate email message for each path coming into it. To send the message to recipients only once, use a converging gateway in front of the end event to reduce the incoming paths to one.
Gateways	Event-based gateways can be used to evaluate Wait events and Receive Message events.	Event-based gateways can be used to evaluate Wait events, Receive Message events, and user Activities (i.e., route and approval elements).
Send Message Recipients	Send Message events can find an email address in modules with a direct, one-to-one or one-to-many relationship with the target module when the target module is on the "Many" side.	Send Message events can find an email address in any module related to the target record as well as find recipients associated with modules related to the related modules.

Administration

The following 8.0.x Administration features have changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 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 username and password information to be entered to connect to the mail provider.	<p>Beginning with version 9.0.5, Sugar supports OAuth2 connections to Google Mail and Exchange Online when configuring the outbound system email account, user email accounts, as well as inbound email accounts.</p> <p>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.</p> <p>For more information, refer to the announcements on Microsoft Tech Community and G Suite Updates.</p>
Job Scheduler	Stock schedulers may have end dates of December 31, 2020.	Upgraded instances to version 9.0.5 will have the end date values removed from stock schedulers that have an end date of

		December 31, 2020.
Advanced Workflow Settings	The "Cycle Number of Errors" setting for Advanced Workflow is found in Admin > Advanced Workflow > Settings.	The "Cycle Number of Errors" setting for Advanced Workflow is found in Admin > System Settings in the SugarBPM™ panel. Auto-save and auto-validate options have also been added to this panel.
License Limit Enforcement	Administrators are prevented from creating more active users than their license allows. Users can log in and use Sugar even when the licensed user limit has been exceeded.	Administrators are redirected to the Users module on login and are prevented from creating more active users than their license allows. Regular users are unable to log in if the licensed user limit has been exceeded.

Data Privacy

The following 8.0.x Data Privacy features have changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Activity streams	Customers making use of the Data Privacy erasure feature must disable activity streams and remove existing activity stream entries from the database for erased records to ensure full removal of the individual's information from the system.	Erasing personal information via the Data Privacy module also erases the values from activity stream entries.
Erased value links	When a clickable value has been erased via the Data Privacy module, users can navigate to the record by clicking on the	When a clickable value has been erased via the Data Privacy module, users can navigate to the record by clicking on the

	link icon next to the "Value Erased" placeholder pill.	"Value Erased" placeholder pill itself, which includes a link icon.
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Quotes

The following 8.0.x Quotes feature has changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Unit Price	When the line item's currency differs from the system default currency, the Unit Price field will display the transactional amount in a grey box in the line item's currency and a converted amount in the system default currency. If the user's preferred currency is configured and the "Show Preferred Currency" option is enabled, then the converted amount will display in the user's preferred currency instead.	If the line item's currency differs from the quote's currency then the Unit Price field will display the transactional amount in the line item's currency and the converted amount in the quote's selected currency.

Quoted Line Items

The following 8.0.x Quoted Line Items feature has changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Cost, Unit Price, List Price	When a quoted line item is saved in a currency that differs from the system default currency, the Cost, Unit Price, and List Price fields will display a converted amount in the	The cost, unit price, and list price amounts for quoted line items no longer display a converted amount using the system default currency or user's preferred currency.

	<p>system default currency next to the transactional amount in the line item's currency. If the user's preferred currency is configured and the "Show Preferred Currency" option is enabled, then the converted amount will display in the user's preferred currency instead.</p>	
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Reports

The following 8.0.x Reports features have changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Export	Reports that are created as the Rows and Columns type can be exported to CSV.	All report types have the Export option and can be exported to CSV by users who have Export role permissions enabled.
Report chart types	The Reports module offers two bar-chart options for data visualization: Vertical Bar and Horizontal Bar.	The Reports module offers four bar-chart options for data visualization. The existing bar charts are now labeled "Vertical Bar (Stacked)" and "Horizontal Bar (Stacked)". The new bar charts are "Vertical Bar (Grouped)" and "Horizontal Bar (Grouped)".
Stock reports	Sugar's Reports module comes with a few stock reports.	Sugar comes with over 100 new stock reports , thoughtfully designed for different user roles. Both new installations and upgraded instances will receive the new reports, which can be identified

		using the "Stock Reports" tag or the new list-view filter for stock reports.
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Scheduled Reports

The following 8.0.x Scheduled Reports features have changed in 9.0.x:

Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Report Schedules module	Users can click on the --none-- link in the Reports list view to schedule an emailed report. Scheduled reports can only be sent to the user who is scheduling the report.	The new Report Schedules module allows users to schedule and easily manage regular email deliveries of Sugar reports to themselves and, for Sugar Enterprise and Ultimate, to other Sugar users. Any existing scheduled reports will be automatically migrated upon upgrade and can be accessed via list view in the Report Schedules module.
"Scheduled" field	The Reports module contains a "Schedule Report" field on list view and preview and a "Scheduled" field on a report's record view.	The "Schedule Report" and "Scheduled" fields are no longer used. To see if a report has been scheduled, select "View Schedules" from the report's actions menu.
Report charts	When scheduled, reports with charts will display their charts in the emailed PDF.	When scheduled, reports with charts will not contain charts in the emailed PDF.

User Interface

The following 8.0.x User Interface feature has changed in 9.0.x:

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Feature	Sugar 8.0 Behavior	Sugar 9.0 Behavior
Login warning message	A warning message displays directly on the login screen if either the number of active users exceeds the license limit, the Sugar license has expired/is due to expire, or the system is undergoing scheduled maintenance.	The warning message now displays once the user attempts to log in to Sugar.

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