
What to Expect When Upgrading to 10.1 (Q3 2020)

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What to Expect When Upgrading to 10.1 (Q3 2020)

Overview

Upgrades to Sugar 10.1 (Q3 2020) are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 10.1 (Q3 2020).

For the upgrade, please keep in mind that there are some key features of 10.0.x that have changed or are not available in Sugar 10.1.x. Some of the items that are unavailable in Sugar 10.1.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 10.0.x to 10.1.x.

For information regarding new functionality available in 10.1.x, please refer to the release notes specific to your Sugar product:

- [Sugar Sell 10.1 Release Notes](#)
- [Sugar Serve 10.1 Release Notes](#)
- [Sugar Ultimate 10.1 Release Notes](#)
- [Sugar Enterprise 10.1 Release Notes](#)
- [Sugar Professional 10.1 Release Notes](#)

Feature Disparity Between 10.0.x and 10.1.x

10.0.x features in the following categories have changed or are no longer available in 10.1.x:

- [Administration](#)
- [Calls and Meetings](#)
- [Campaigns](#)
- [Consoles](#)
- [Dashboards](#)
- [Employees](#)
- [Import](#)
- [Licenses](#)
- [Opportunities and Revenue Line Items](#)
- [Quoted Line Items](#)
- [Revenue Line Items](#)

- [SugarBPM](#)
- [Tile View](#)
- [User Interface](#)

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

Administration

The following 10.0.x Administration features and behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
"Sugar Connect" Admin page section	The Sugar Connect section of the Admin page contains the "License Management", "Sugar Updates", and "Online Documentation" sections.	The Sugar Connect section has been removed from the Admin page. The "License Management" and "Sugar Updates" sections have been moved to the System section of the Admin page. The online documentation can be accessed by clicking the Help link in Sugar's footer.
"Validate user IP address" setting	The "Validate user IP address" setting is enabled by default in Admin > System Settings.	Out-of-the-box, the "Validate user IP address" setting is disabled by default.
"Enable additional login screen content" setting	The "Enable additional login screen content" setting is available in Admin > System Settings.	The "Enable additional login screen content" setting is not available in Sugar.
Campaign field	The Campaign field is available in Studio to be added to Mobile views but is always blank in Sugar Mobile.	The Campaign field is not available in Studio to be added to Mobile views. However, it is preserved if it is already displayed on a view but will not be available to add again if removed.
Legacy workflows	Legacy workflows based on custom modules remain in Sugar after the custom	Legacy workflows based on custom modules are removed when the custom

	module is uninstalled.	module is uninstalled.
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Calls and Meetings

The following 10.0.x Calls and Meetings behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Repeat on Days of Week field	When creating or editing calls and meetings with a weekly repeat type, the Repeat on Days of Week field defaults to the current day.	When creating or editing calls and meetings with a weekly repeat type, the Repeat on Days of Week field defaults to the day that corresponds with the Start Date.

Campaigns

The following 10.0.x Campaigns behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Set Up Email option	The Campaigns module actions menu includes the Set Up Email option.	The Set Up Email option is not available in the Campaigns module actions menu. The campaign email settings are still accessible in Admin > System Email Settings .

Consoles

The following 10.0.x Console behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Console Settings	The Console Settings window provides some basic directions for the different setting options as	The Console Settings window provides a link that allows you to easily access the Console

	well as a link (i.e. Restore Defaults) to restore the console back to the default out-of-the-box settings.	Management documentation for additional information on configuring the various settings. You can also click the "Click here" link to restore the console back to the default out-of-the-box settings.
	The available fields to select in the Primary and Secondary Sort Order dropdown lists are not configurable.	The available fields in the Primary and Secondary Sort Order dropdown lists are updated by adding and removing fields in the Columns list of the Console Settings window.

Dashboards

The following 10.0.x Dashboard behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Record View dashlet	The Record View dashlet layout can only be configured in Studio for the Accounts, Cases, and Opportunities modules.	The Record View dashlet layout can be configured in Studio for all supported Sidecar modules, including custom modules.
Active Subscriptions dashlet	The Active Subscriptions dashlet is available to add in Sugar Sell, Sugar Serve, and Sugar Enterprise.	The Active Subscriptions dashlet is only available to add in Sugar Sell and Sugar Serve.
	The Active Subscriptions dashlet is populated with data from the Revenue Line Items module.	The Active Subscriptions dashlet is populated with data from the Purchased Line Items module.

Employees

The following 10.0.x Employees behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Deleting/copying employee records	For instances that use SugarIdentity, the administrator cannot copy or delete employee records.	For instances that use SugarIdentity, the administrator can delete a non-user employee record as well as duplicate employee records.

Import

The following 10.0.x Import behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
"Date Modified" and "Modified By" fields	Changed values in the Date Modified and Modified By fields are ignored on import.	Changed values in the Date Modified and Modified By fields are respected on import. When values are blank, the date of import and ID of the user performing the import populate these fields.

Licenses

The following 10.0.x License behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
License-restricted fields	Users can add fields to layouts in Studio even if they do not have the appropriate license type to access the field.	Users cannot add fields to layouts in Studio if they do not have the appropriate license type to access the field. They can remove these fields if they are already on the layout, but cannot re-add them after saving and deploying.

	If a user does not have the required license type to view a particular field, the field is still displayed on record view.	If a user does not have the required license type to view a particular field, the field is removed from record view.
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Opportunities and Revenue Line Items

The following 10.0.x Opportunities and Revenue Line Items behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Automatic purchase generation	Closing an opportunity with revenue line items as "Closed Won" does not have additional functionality.	In Sugar Sell, closing an opportunity with revenue line items as "Closed Won" can trigger the automatic generation of purchases and purchased line items.
Managing revenue line items at the opportunity level	On the opportunity record, the Sales Stage and Expected Close Date fields are not able to be edited.	Expected close date, sales stage, and service start date can now be set at the opportunity level and pushed to all open related revenue line items.
Expected Close Date field	The Expected Close Date field on opportunities shows the latest expected close date value of all related revenue line items.	The Expected Close Date field on opportunities shows the latest expected close date value of only the open related revenue line items, until all are either "Closed Won" or "Closed Lost".
	In Studio, the Expected Close Date field has a calculated value using a Sugar Logic formula.	In Studio, the Expected Close Date field does not have a calculated value using a Sugar Logic formula; instead, its value is calculated internally by Sugar.
Opportunities' preview layout	The opportunity record view and preview view	The order of fields on the opportunity record view

	layouts match by default.	does not match the order of fields on the preview view by default.
Revenue Line Items subpanel layout	Configuration changes made in Studio for the Revenue Line Items subpanel layout in the Opportunities module do not apply to the Revenue Line Items subpanel in the opportunities create view.	The Revenue Line Items subpanel in the opportunities create view respects the customizations made in Studio for the Revenue Line Items subpanel layout in the Opportunities module.

Quoted Line Items

The following 10.0.x Quoted Line Items behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Quantity value	Quoted line items do not support negative "Quantity" values.	Quoted line items support negative "Quantity" values, which can be used for credits or price adjustments.

Revenue Line Items

The following 10.0.x Revenue Line Items behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Calculated Amount field	The Calculated Revenue Line Item Amount field exists on the Revenue Line Items module.	The Calculated Revenue Line Item Amount field has been renamed to "Calculated Amount" on the Revenue Line Items module.
Discount Amount field	The Total Discount Amount field is on the Revenue Line Items record view and allows	The field has been renamed to "Discount Amount" and allows users to enter the discount in a

	users to enter the discount in a flat amount.	flat amount or a percentage.
Quantity value	Revenue line items do not support negative "Quantity" values.	Revenue line items support negative "Quantity" values, which can be used for credits or price adjustments.
Name field	The revenue line item name field is called "Revenue Line Item".	The revenue line item's name field label has been changed to "Name".

SugarBPM

The following 10.0.x SugarBPM behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Round robin by availability	SugarBPM Round Robin actions assign records to users in the same order every time.	SugarBPM Round Robin actions can be configured to assign records to users based on the users' availability .

Tile View

The following 10.0.x Tile View behavior has changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Ad-hoc filters	When a saved or stock filter is selected in tile view or in list view, it is sticky when switching between the two views. However, ad-hoc filters are not sticky when switching between tile view and list view.	An ad-hoc filter applied to the tile view will automatically apply to the module's list view and vice versa and remain sticky when switching between the two views.

User Interface

The following 10.0.x User Interface features and behaviors have changed in 10.1.x:

Feature	Sugar 10.0 Behavior	Sugar 10.1 Behavior
Comment Log	Users cannot choose to receive email notifications when mentioned in a Comment Log entry.	Users can choose to receive email notifications when mentioned in a Comment Log entry.
Subpanel filter bar	Subpanel filter bars are included on the Product Type, Manufacturers, Shipping Providers, and Tax Rate record views.	The Product Type, Manufacturers, Shipping Providers, and Tax Rate record views do not have subpanel filter bars.
Text Area fields	Hyperlinks in text area fields appear as plain text and are not clickable.	Hyperlinks (e.g. www.sugarcrm.com) in text area fields are clickable and will open the link in a new tab.
User-defined list view column widths	In list view, opening/closing the intelligence pane or resizing the browser window resets column widths to their default settings.	In list view, user-defined column widths are preserved when opening/closing the intelligence pane or resizing the browser window.

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