
What to Expect When Upgrading to 11.2 (Q4 2021)

What to Expect When Upgrading to 11.2 (Q4 2021)	3
Overview	3
Feature Disparity Between 11.1.x and 11.2.x	3
Action Buttons	4
Administration	4
Calendar	5
Calls and Meetings	5
Dashboards and Dashlets	6
Doc Merge	6
Email	7
Notes and Attachments	7
Opportunities	7
Portal	8
Product Catalog	8
Quotes	9
SugarLive	9
User Interface	10

What to Expect When Upgrading to 11.2 (Q4 2021)

Overview

Upgrades to Sugar 11.2 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 11.2 (Q4 2021).

For the upgrade, please keep in mind that there are some features of 11.1 (Q3 2021) that have changed or are not available in Sugar 11.2.x. Some of the items that are unavailable in Sugar 11.2.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 11.1.x to 11.2.x.

For information regarding new functionality available in 11.2.x, please refer to the release notes specific to your Sugar product:

- [Sugar Sell 11.2 Release Notes](#)
- [Sugar Serve 11.2 Release Notes](#)
- [Sugar Ultimate 11.2 Release Notes](#)
- [Sugar Enterprise 11.2 Release Notes](#)
- [Sugar Professional 11.2 Release Notes](#)

Feature Disparity Between 11.1.x and 11.2.x

11.1.x (Q3 2021) features in the following categories have changed or are no longer available in 11.2.x (Q4 2021):

- [Action Buttons](#)
- [Administration](#)
- [Calendar](#)
- [Calls and Meetings](#)
- [Dashboards and Dashlets](#)
- [Doc Merge](#)
- [Email](#)
- [Notes and Attachments](#)
- [Opportunities](#)
- [Portal](#)
- [Product Catalog](#)

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

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

Action Buttons

The following 11.1.x Action Buttons behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
Action Buttons in Action menus	The Action Button field type can be displayed in records and record headers.	The Action Button field type can be displayed in records, record headers, and in Action menus. Including Action Buttons in Action menus requires configuration in a new section of the Action Buttons configuration page. Please refer to the Action Buttons documentation for more information.
Chained actions	Action Buttons are limited to one action per button.	Multiple, chained actions can be assigned to one Action Button and re-ordered by dragging and dropping in the Actions section of the configuration page.
Mobile compatibility	Action Buttons are not available in Sugar Mobile.	Action Buttons are available on detail and edit views in Sugar Mobile.

Administration

The following 11.1.x Administration behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
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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.
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Calendar

The following 11.1.x Calendar behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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.

Calls and Meetings

The following 11.1.x Calls and Meetings behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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".
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Dashboards and Dashlets

The following 11.1.x Dashboards and Dashlets behavior have changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
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 Modified value for the related activity displays to the left of the record card.	The Date Created (e.g., for notes and draft emails) or 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.

Doc Merge

The following 11.1.x Doc Merge behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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.

Email

The following 11.1.x Email behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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 system outgoing email account is used as the default "From" address when composing an email.

Notes and Attachments

The following 11.1.x Notes and Attachments behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
Multi-select files for attachment using Ctrl or Shift key	You can add multiple attachments to an email, knowledge base, or note record by attaching one at a time.	You can add multiple attachments to a case, email, knowledge base, or note record at once by holding the Ctrl or Shift key while selecting attachments.
Notes list view	The Notes list view shows notes as well as the notes that are only an attachment.	The Notes list view only shows note records and does not list attachment-only notes.

Opportunities

The following 11.1.x Opportunities behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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.

Portal

The following 11.1.x Portal behavior has changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
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 note. Emails and message are not displayed.	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 within the list.

Product Catalog

The following 11.1.x Product Catalog features and behavior have changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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

The following 11.1.x Quotes features and behavior have changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 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.

SugarLive

The following 11.1.x SugarLive features and behavior have changed in 11.2.x:

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Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
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.

User Interface

The following 11.1.x User Interface features and behavior have changed in 11.2.x:

Feature	Sugar 11.1 Behavior	Sugar 11.2 Behavior
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.

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