What to Expect When Upgrading to 7.7

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Overview

Upgrades to Sugar 7.7 are available or required for instances according to the following guidelines:

- On-demand 7.x instances that are not highly customized will be upgraded to 7.7.
- On-site 6.5.x and 7.x instances have the option to upgrade to 7.7.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that there are some key features of 6.5.x and 7.x which have been changed or are not available in Sugar 7.7.x. Some of the items that are unavailable in Sugar 7.7.x will be made available in a future release. To help provide you with the necessary information, this article covers what to expect when upgrading your instance from 6.5.x or 7.x to 7.7.x. For information about differences between 7.5.x, 7.6.x, and 7.7.x, please refer to the [7.7 Release Notes](#) specific to your Sugar edition.

Updated User Interface

Modules in Sugar 7.7.x use either the Legacy or Sidecar user interface. Modules on the Legacy user interface will continue to display the same layout and functionalities in 6.5.x. Modules using the Sidecar user interface will have new layouts and functionalities (e.g. Record View, Intelligence Panes, Module Search, etc.). Please note that modules using the Legacy user interface utilize the time zone specified in your user profile while modules using the Sidecar user interface utilize your browser's set time zone. It is recommended that the time zone defined in your user profile match your browser's set time zone to avoid any inconsistencies after upgrading to 7.7.x. For more information on the Sidecar user interface, please refer to the [User Interface](#) documentation.

Sidecar Modules	Legacy Modules
Accounts	Calendar
Bugs	Campaigns
Calls	Contracts
Cases	Documents
Contacts	Emails

Forecasts	Employees
Home	Product Types
Knowledge Base	Quotes
Leads	Reports
Meetings	
Notes	
Opportunities	
Processes	
Process Business Rules	
Process Definitions	
Process Email Templates	
Product Catalog	
Product Categories	
Quoted Line Items	
Revenue Line Items	
Tags	
Targets	
Target Lists	
Tasks	

Please note that custom modules installed in your Sugar instance that were created outside of Module Builder will use the Legacy user interface upon upgrade to 7.7.x. The functionality of custom modules will remain the same as in 6.5.x. Custom modules that were created in Module Builder and deployed in your instance will utilize the Sidecar user interface upon upgrade to 7.7.x. Please note that deploying a module from Module Builder in 7.7.x which was built in version 6.5.x will cause the module to use the Sidecar user interface.

Feature Disparity Between 7.x and 7.7.x

Sugar 7.x features that have been changed or are no longer available in 7.7.x are as follows:

Category	Feature	Sugar 7.x	Sugar 7.7.x
Calls	Invitees	The Contacts, Users, and Leads subpanels in the Calls detail view	All invitees (Contacts, Users, Leads) for the call now display in the

		display all invitees for the call in 7.5.x.	Guests panel on the Calls record view.
	Time and Date	- Duration Hours and Duration Minutes fields are available in Admin > Studio to add to the Calls layout in 7.5.x. - Individual Start Date and End Date fields can be added and displayed in the Calls detail view in 7.5.x.	- Duration Hours and Duration Minutes fields are not available in Studio. - Call's start date and end date is now a combination field (Start & End Date) including duration in the record view.
Knowledge Base	Embedding Images	Users can embed images to the body of the Knowledge Base article by choosing the image file from the Embedded Images field then clicking the Plus icon to add the image.	The Embedded Images field is not available upon upgrade to 7.7.x. Users can insert images in the Knowledge Base article using the Insert/Edit Image button in the TinyMCE editor.
	List View Search Filter	- The Pending my Approval, Added Last 30 days, and Updated Last 30 days filter options are available in the Basic and Advanced Search panels. - Users can save search filters	- The Pending my Approval, Added Last 30 days, and Updated Last 30 days filter options are not available in the list view Filter option. - The user's saved searches in the

	Revision	Users can set the knowledge base article's current revision number by entering the appropriate value in the Revision field.	The Revision field for all previously existing knowledge base articles will be set to "1" upon upgrade to 7.7.x.
		for articles in the Advanced Search panel.	Advanced Search panel will not be preserved after upgrading to 7.7.x.
	Tags	- All tags can be viewed under the Browse tab in the Knowledge Base list view. - Users can click "Untagged Articles" under the Browse tab in the Knowledge Base list view to view all articles with no tags.	- All tags will display in the Knowledge Base categories (e.g. Knowledge Base Categories & Published Articles dashlet, View Categories list view, etc.) upon upgrade to 7.7.x. - To view the list of articles with no tags, filter the list view search using the Tags field with the condition "is empty".
Meetings	Invitees	The Contacts, Users, and Leads subpanels in the Meetings detail	All invitees (Contacts, Users, Leads) for the meeting now

		view display all invitees for the meeting in 7.5.x.	display in the Guests panel on the Meetings record view.
	Time and Date	- Duration Hours and Duration minutes fields are available in Admin > Studio to add to the Meetings layout in 7.5.x. - Individual Start Date and End Date fields can be added and displayed in the Meetings detail view in 7.5.x. - Administrators can set the display type for the Meetings detail view to "Tab" via Admin > Studio in 7.5.x.	- Duration Hours and Duration Minutes fields are not available in Studio. - Meeting's start date and end date is now a combination field (Start & End Date) including duration in the record view. - If the display type for the Meetings detail view is set to "Tab" in 7.5.x, the Start & End Date field may display in a different location on the record view after upgrading to 7.7.x.
Portal	Portal Configuration	Administrators can configure the Sugar Portal layout (Record View, List View) for Knowledge Base via Admin > Sugar Portal to determine which fields appear	Changes made to the Sugar Portal layout (Record View, List View) for Knowledge Base via Admin > Sugar Portal are not preserved after upgrading to 7.7.x.

		in the portal.	
Process Author	Currency Fields	In 7.6.x, Process Author treated currency fields as integer fields.	Currency fields have been updated from integer type to currency type. Process Definitions and Business Rules that were created in 7.6.x and reference currency fields must be edited for the updated field type.
	Import/Export	Process definition, business rule, and email template records can be exported and imported to Sugar instances.	Process Author files exported from Sugar version 7.6.1.0 or earlier cannot be imported to Sugar instances running 7.6.2.0, 7.7.x, or later.
	Knowledge Base Processes	The Knowledge Base module used Sugar's legacy user interface in 7.6.x and earlier versions.	Process definitions, business rules, and email templates that were created in 7.6.x and use Knowledge Base as a target module must be reconfigured to be compatible with the updated Knowledge Base module, which has been updated to the Sidecar user interface.
	Start Events	In 7.6.x, when applying a process definition's Start event to all updates of a record, a new process will begin every time the record is edited and	When applying a process definition's Start event to all updates of a record, a new process will not begin if that process definition is already running a

		the specified criteria are met.	process against the record.
Reports	Group By	Reports which group records by fields with more than 50 options render Pie, Horizontal Bar, or Vertical Bar charts correctly. Funnel charts can be broken into more than 16 groups.	Reports which group records by fields with more than 50 options do not render Pie, Horizontal Bar, or Vertical Bar charts and display an error message. Funnel charts will not display if the group by field(s) break the records into more than 16 groups.
Search	Global Search	- When a keyword is entered in the search box, the matching term (e.g. company) will display in bold in the Quick Search Results list. - Users can only search for primary email addresses. - Search operators such as wild card characters (e.g. %, *) as well as non-wildcard characters (e.g. "") may be used to broaden or refine search	- When a keyword is entered in the search box, the Quick Search Results list will include the primary field (e.g. name, subject) for records matching the search term as well as any secondary fields (e.g. email address, office phone, etc.) matching the search term. - Users can search across all email addresses. - Search operators are

		results.	no longer necessary due to improved Global Search functionality.
	List View Search Filter	List view search filters can be created and saved. When you run a search using the created filter, the search will be preserved and display the results of your last filter when returning to the list view.	The list view search filter will not be preserved to display the results of your last filter after upgrading from 7.5.x to 7.7.x. You can select the previously created and saved filter from the Filter option to view the appropriate results.
Workflow Management	Workflow Process	Administrators can create workflows based on the Knowledge Base module via Admin > Workflow Management.	Workflows based on the Knowledge Base module will not work after upgrading to 7.7.x. Administrators will need to re-create all workflows based on the Knowledge Base module after the upgrade.

Feature Disparity Between 6.5.x and 7.7.x

Sugar 6.5.x features which have been changed or which are no longer available in 7.7.x are as follows:

Note: The Tour icon is only enabled for Sidecar modules.

Category	Feature	Sugar 6.5.x	Sugar 7.7.x
Accounts	Copy Address	The Copy icon in the address field can be clicked to copy the account's billing or shipping	The Copy icon is not available to copy the account's billing or shipping address to the

		address to the related contact(s).	related contact(s).
Admin Page	SugarCRM Support Link	The SugarCRM Support link is available in the Admin page and provides access to the SugarCRM Support page with various resources such as the case portal, documentation, knowledge base, training, etc.	The SugarCRM Support link is removed from the Admin page and is now available in Sugar's footer.
Advanced Configuration Option	Disabling Automatic Searches	List views can be prevented from automatically executing a search when users navigate to list views by adding $sugar_config['save_query'] = 'populate_only'; to the config_override.php file.	The $sugar_config['save_query'] = 'populate_only'; setting is not supported for Sidecar modules. Sidecar list views will automatically execute a search each time the list view is visited.
Calls	Invitees	The Contacts, Users, and Leads subpanels in the Calls detail view display all invitees for the call.	All invitees (Contacts, Users, Leads) for the call now display in the Guests panel on the Calls record view.
	Time and Date	• Duration Hours and Duration Minutes fields are available in Admin > Studio to add to the Calls layout.	• Duration Hours and Duration Minutes fields are not available in Studio. • Call's start date and end

		• Individual Start Date and End Date fields can be added and displayed in the Calls detail view.	date is now a combination field (Start & End Date) including duration in the record view.
Connectors	Box.net Connector	View, upload, and manage Box.net files via a Box dashlet within Sugar's home page.	Once the Box package is installed in Sugar, the Box dashlet will appear in the list of available dashlets to add to Sugar's home page and intelligence pane.
	Facebook Connector	View Facebook posts via the My Activity Stream dashlet on the user's Home page.	The Facebook connector is not available.
	InsideView Connector	InsideView subpanel provides relevant company information, news, and social media insights. The subpanel appears in the detail view of the Accounts, Contacts, Leads, and Opportunities modules. The connector can be enabled via Admin > Connectors.	The InsideView connector is not available.
	Zoominfo Connector	Search, view, and merge data on a company or person from Zoominfo via the Get Data option in the record's detail view for	The Zoominfo connector is not available.

		enabled modules (e.g. Account).	
Dashboards	Dashlet Configuration	- Display column widths for module dashlets can be configured via Admin > Studio. - Fields can be made available via Admin > Studio (Sugar Dashlet Search layout) to filter list view dashlets on the Home page.	- Studio's list view width setting is not respected for Sidecar modules' list view dashlets. - The Search layout in Admin > Studio controls the list of fields available to filter the List View dashlet for Sidecar modules.
	Dashlet Row-Level Edit	Records can be edited in dashlets by clicking the Pencil icon to the far right of the record's row.	The Pencil icon is not available in dashlets to quick edit records.
	Dashlet Total Record Count	The total record count is displayed on the right just below the dashlet header. The parenthesis in between the set of arrows displays the total number of records in the dashlet results set.	Pagination is not available to provide total record counts in dashlets.
	Stock Dashlets	My Activity Stream dashlet allows team members to view each	The My Activity Stream and My Project Tasks dashlets

		other's activities and actions related to various Sugar modules.	will not be available in the Legacy Dashboard upon upgrade to 7.7.x.
		• My Favorite Records dashlet displays records users have marked as favorites.	• The Project Tasks dashlet may be configured as a list view dashlet.
		• My Project Tasks dashlet displays the user's related project tasks.	• The My Calendar, My Favorite Records, and Team Notice dashlets are not available to add.
		• My Calendar dashlet can be added to the user's Home page to view and schedule activities (meetings and calls).	• The News Feed dashlet is called the RSS Feed dashlet.
		• News Feed dashlet can be added to the Home page to view various RSS feeds.	• Some of the pre-defined reports are not available to add as dashlets:
		• Various pre-defined report charts can be added as dashlets on the Home page to view sales and opportunities related data.	○ All Opportunities by Lead Source by Outcome ○ Campaign ROI ○ Modules Used by Team Members (last 30 days)
		• Team Notice dashlet displays	○ Outcome by Month

		team-specific announcements posted by the administrator. These announcements display as a scrolling marquee within the dashlet to be viewable by members of the specified team via their Home page.	
Forecasting	Forecasting	The Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales.	The Forecasts module for Enterprise and Ultimate editions can incorporate individual revenue line items which aggregate to opportunities. Administrators can make this change via Admin > Opportunities. Forecasting for Corporate and Professional remains unchanged.
Home	Reset Homepage	Users can reset their Homepage back to the default out-of-the-box layout by clicking the "Reset Homepage" button in user preferences.	The "Reset Homepage" button is not available.
Knowledge Base	Embedding Images	Users can embed images to the body	The Embedded Images field is not

		of the Knowledge Base article by choosing the image file from the Embedded Images field then clicking the Plus icon to add the image.	available upon upgrade to 7.7.x. Users can insert images in the Knowledge Base article using the Insert/Edit Image button in the TinyMCE editor.
	List View Search Filter	• The Pending my Approval, Added Last 30 days, and Updated Last 30 days filter options are available in the Basic and Advanced Search panels. • Users can save search filters for articles in the Advanced Search panel.	• The Pending my Approval, Added Last 30 days, and Updated Last 30 days filter options are not available in the list view Filter option. • The user's saved searches in the Advanced Search panel will not be preserved after upgrading to 7.7.x.
	Revision	Users can set the knowledge base article's current revision number by entering the appropriate value in the Revision field.	The Revision field for all previously existing knowledge base articles will be set to "1" upon upgrade to 7.7.x.
	Tags	• All tags can be viewed under the Browse tab in the Knowledge Base list view.	• All tags will display in the Knowledge Base categories (e.g.

		• Users can click "Untagged Articles" under the Browse tab in the Knowledge Base list view to view all articles with no tags.	Knowledge Base Categories & Published Articles dashlet, View Categories list view, etc.) upon upgrade to 7.7.x. • To view the list of articles with no tags, filter the list view search using the Tags field with condition "is empty".
Lead Conversion	Configuration Options	• Various modules can be added to the convert lead process via Admin > Studio. • Administrators can specify the convert layout for each of these modules to specify the available fields when converting leads. • Modules included in the lead conversion process can be configured to allow or disallow the	• Using Admin > Studio, only certain modules (Bugs, Calls, Cases, Meetings, Notes, Targets, custom modules, etc.) may be added to the lead conversion process. • The fields available for each module during lead conversion match those specified in the module's record view layout.

		selection of an existing record (rather than requiring creation of a new record) using the Allow Selection option in Admin > Studio.	• Modules included in the lead conversion process will allow selection of an existing record with no configurability to require the creation of a new record.
List View	List View Configuration	• Data in list view automatically wrap within the display column upon re-sizing of the browser window. • List view columns can be re-ordered via the Layout Options in advanced search. • The list view column widths increase and decrease in size depending on the size of the browser window.	• Data in list view does not wrap within the display column upon re-sizing the browser window. • List view columns can be re-ordered by dragging and dropping the columns. • The list view column width does not change based on the window browser size for Sidecar modules. • Users can configure their own list view column widths which persist across sessions based on browser cookies. Column widths

			set by user supersedes administrator configuration in Studio.
	List View Sort	A default order-by-column can be set in the list view based on the user's preference using the layout options in Advanced Search.	The user's pre-defined list view sort will not be preserved after upgrading to 7.7.x.
	Mass Action	The Select All option allows a user to perform mass actions (Delete, Mass Update, Export, etc.) on the entirety of the current search results in a module, as limited by PHP resources.	The Select All option allows users to perform mass actions (Delete, Mass Update, Export, etc.) on the first 1000 records of the current search results in a module.
Mail Merge	Mail Merge	The mail merge option is available for various modules (e.g. Accounts, Contacts, Leads, etc.) and allows users to combine data from Sugar with a mail merge template.	The mail merge functionality in the application is not supported. User's can continue to perform a mail merge using the Word Plug-in.
Meetings	Invitees	The Contacts, Users, and Leads subpanels in the Meetings detail view display all invitees for the meeting.	All invitees (Contacts, Users, Leads) for the meeting now display in the Guests panel on the Meetings record view.
	Time and Date		

		• Duration Hours and Duration Minutes fields are available in Admin > Studio to add to the Meetings layout. • Individual Start Date and End Date fields can be added and displayed in the Meetings detail view. • Setting the display type for the Meetings detail view to "Tab" via Admin > Studio continue to display fields in the same location on the layout after the upgrade.	• Duration Hours and Duration Minutes fields are not available in Studio. • Meeting's start date and end date is now a combination field (Start & End Date) including duration in the record view. • If the display type for the Meetings detail view is set to "Tab" in 6.x, the Start & End Date field may display in a different location in the record view after upgrading to 7.7.x.
Module Builder	Custom Module (Deploy)	Module Builder enables administrators to create, deploy, and maintain custom modules in Sugar. Modules can be created in Module Builder then deployed within your instance of Sugar.	• Custom modules created in Module Builder and deployed in 6.5.x will utilize the Sidecar user interface upon upgrade to 7.7.x.

			• Deploying a module from Module Builder in 7.7.x which was built in 6.5.x will cause the module to use the Sidecar user interface.
Offline Client	Offline Client Support	Offline client is available with Enterprise and Ultimate editions of Sugar and allows users to be able to use Sugar without being connected to the server. Each user can be enabled to use the offline client from the User Preferences page or an administrator can set all users to be enabled by default.	Offline client is not supported.
Opportunities	Revenue Line Items	The Opportunity module tracks sales opportunities at the deal level.	• For Enterprise and Ultimate editions, opportunity records can contain revenue line item records which track sales opportunities at the line item level. • Administrators can change how the

			instance tracks opportunities via Admin > Opportunities for Enterprise and Ultimate editions.
	Opportunity Amount	The opportunity amount for an opportunity may differ from a related quote's quote line items as the two amounts are not connected.	For Enterprise and Ultimate editions using opportunities with revenue line items in 7.7.x, each opportunity will have revenue line items generated. If the opportunity is related to a quote, revenue line items will generate based on the related quote line items. This may cause the opportunity amount (e.g. Likely) in 7.7.x to be different from the 6.5.x opportunity amount as it will equal the sum of the generated revenue line items.
	Probability (%)	The system automatically populates the corresponding probability value (e.g. 10, 20, etc.) based on the selected sales stage. Users can edit the default probability value in the opportunity record.	The probability value is now calculated based on the opportunity's sales stage and can no longer be edited.

	Quote to Opportunity Conversion	Converting a quote to an opportunity causes the opportunity amount to match the quote total, including any shipping and tax.	• For Enterprise and Ultimate editions where opportunities are used in combination with revenue line items, converting a quote to an opportunity causes revenue line items to be created matching the quoted line item totals. Any tax or shipping on the quote will not be included in these amounts, so the opportunity total will be the sum of the quoted line items rather than the entire quote. • Opportunities converted from quotes in 6.5.x will still include tax and shipping in the revenue line item and opportunity totals.
Portal	Portal Installation	The Sugar portal must be installed by	• No installation

		administrators for 6.5.x. Prior to installation, you must enable the portal user management via Admin > System Settings and create a Portal API user via Admin > User Management.	is required for the portal in 7.7.x. You can enable/disable the portal by checking the Configure Portal option in Admin > Sugar Portal. The Portal API user and Customer Self-Service Portal role are automatically created. • Upon upgrade to 7.7.x, you will still have access to the old 6.5 portal. • Portal authentication is driven by oAuth2. • For more information regarding the Sugar Portal, please refer to the Portal Deployment User Guide specific to your edition of Sugar.
	Portal Configuration	• The Sugar Portal layout (EditView, DetailView, ListView) for Bugs, Cases, Knowledge	• The Sugar Portal layout (Record View, List View) for Bugs, Cases, Contacts, and Knowledge

			Base, and Leads can be edited via Admin > Sugar Portal.	Base can be edited via Admin > Sugar Portal. Note: Any configurations made via Admin > Sugar Portal will only apply to the new Sugar 7 portal.
			• Any published Knowledge Base articles will appear in the Legacy portal accordingly.	• Changes made to the legacy Knowledge Base layout (Record View, List View) via Admin > Sugar Portal are not preserved after upgrading to 7.7.x.
			• You can control the look and feel of the portal by creating and uploading CSS files via Admin > Sugar Portal > Upload Style Sheet for 6.5.x.	• All published Knowledge Base articles will no longer appear in the Legacy portal after upgrade and will only be available in the new Sugar 7 portal.
				• You can add custom logos, define the number of records to display on the list view, etc. via the Configure Portal option

			in Sugar Portal Editor.
			• The portal theme can be configured and managed via the Theme Portal option in Sugar Portal Editor.
	User Interface	• Basic and Advanced Search panel is available to search for bugs, cases, etc. on the Sugar Portal. • The Detail View layout is used in the portal. • Users can manage newsletter subscriptions via the portal. • Users can view, create, and edit cases and bugs in the portal.	• Advanced Search is not available in the portal. • The Record View layout is used in the portal. • A Home page dashboard is now available. • Users cannot manage newsletter subscriptions via the portal. • Users can only create and view cases and bugs in the portal.
Quotes	Custom Quote Template	Custom Quote templates can be created via code-level customizations to define a new template for printing quotes to PDF.	Existing quote template(s) in 6.5.x will appear with a prefix of "Existing" (e.g. Existing_QuoteTemplate) in the Quotes module after upgrading to 7.7.x. Note: The existing custom quote

			templates cannot be managed (e.g. edited, deleted) via Admin > PDF Manager. But new custom quote templates can be created and managed via PDF Manager in 7.7.
Reports	Group By	Reports which group records by fields with more than 50 options render Pie, Horizontal Bar, or Vertical Bar charts correctly. Funnel charts can be broken into more than 16 groups.	Reports which group records by fields with more than 50 options do not render Pie, Horizontal Bar, or Vertical Bar charts and display an error message. Funnel charts will not display if the group by field(s) break the records into more than 16 groups.
	Quick Edit Related Records	Related records can be edited by clicking on the Pencil icon next to the record's name in Rows and Columns-type or Summation with Details-type reports. A pop-up window opens with a quick create form to update the record and save the changes.	The Pencil icon is not available in reports to quick edit related records. Users can click the related record's name in the report to edit directly via the record view.
Search	Global Search	Pop-up results will begin appearing once you enter	Pop-up results will begin appearing once you enter

		at least three characters. • Global search results specify the module they belong to (e.g. Accounts, Contacts, etc.) and highlight the matching field value below the record's name. • Users can only search for primary email address. • Search operators such as wild card characters (e.g. %, *) as well as non-wildcard characters (e.g. "") may be used to broaden or refine search results.	at least one character. • The specific matching term (e.g. ABC) in the record's field is bolded in the Quick Search Results list. In addition, if any secondary fields (e.g. email address, office phone, etc.) match the search term as well, it will display beneath the record's primary field in the Quick Search Results list. • Users can search across all email addresses. • Search operators are no longer necessary due to improved Global Search functionality.
	List View Search Filter	Multiple teams can be selected in the Teams field to filter for records assigned to one of several teams at once.	One team may be selected at a time when filtering based on the Teams field in Sidecar modules.
Studio	Export Customizations	Customizations made in Studio can	Upgrading to 7.7.x will cause some

		be exported and uploaded to another Sugar instance. Only modules containing customizations are available to export in Studio.	stock modules to be listed as having exportable customizations in Studio.
	List View Width	The list view width can be configured to designate what percentage of the total width of the list view should be dedicated to a specific column.	Changes made to the list view column width in 6.5.x will not carry over to Sidecar modules once upgraded. Administrators can re-configure the column widths for Sidecar modules in Studio upon upgrade as necessary.
	Opportunities Sales Stage Label	Changes can be made to the label for the Opportunities Sales Stage field in Studio.	Any changes made to the label for the Opportunities Sales Stage field in 6.5.x Enterprise and Ultimate will need to be applied to the Revenue Line Items module's Sales Stage field after upgrading to 7.7.x. Note: Applicable for instance's using opportunities with revenue line items in 7.7.x.
	Popup View	• The Popup ListView layout in Admin > Studio can be used to	• The Popup ListView layout in Studio for Sidecar modules

		configure the pop-up list view window used to locate and select records in a specific module. • The Popup Search layout in Admin > Studio can be used to configure the pop-up search layout.	applies to the Search and Select window as well as the corresponding pop-up list view window in Legacy modules. • For Sidecar modules (e.g. Contacts), the Popup Search layout only affects the pop-ups originating in Legacy modules. For specifying fields for Search and Select searches on Sidecar pages, use the Search layout.
	Quick Create Layout	The Quick Create layout can be configured via Admin > Studio to add/remove fields, edit layout, etc.	The Quick Create layout is not available for Sidecar modules in Studio as quick create is now based on the Record View layout. Any changes made to the Quick Create layout in 6.5.x will not carry over to 7.7.x once upgraded.
	Search	Encrypt fields can be added to the Search layout.	Encrypt fields cannot be added to the Search layout. Existing Encrypt fields on the Search

Subpanels	Activities Subpanel	Activities subpanel lists open or upcoming tasks, calls, and meetings that are related to the record. The subpanel appears beneath the record's fields in the detail view.	layout will be removed after upgrading to 7.7.x.
			• There are now individual Calls, Meetings, and Tasks subpanels available in a related module's record view. • The Planned Activities dashlet consists of separate tabs displaying current and future calls and meetings. The dashlet is available in the Record View's intelligence pane and user's Home page.
	Archive Email Option (History Subpanel)	The Archive Email option on the History subpanel allows a received email to be entered manually on a record for historical purposes.	The Archive Email option is available on the History dashlet to manually archive emails for records.
	Compose Email	The Compose Email option is available on the Activities subpanel to compose a new email related to the	New emails can be composed and related to the current record by clicking the Plus button on the

		current record.	Emails subpanel.
	Closing Activities	Calls, meetings, and tasks can be closed via the Activities subpanel. Completed activities will appear in the History subpanel.	Calls, meetings, and tasks can be closed via the Calls, Meetings, and Tasks subpanels. Completed activities will appear in the History dashlet.
	Custom Subpanel Display Label	The display labels of custom modules may be modified via Studio after the module is initially deployed.	After upgrade, the subpanel names of custom relationships may not reflect changes to the display labels made via Studio after the custom module was deployed. Note: Update the display label via Studio after the upgrade to ensure that the value is preserved going forward.
	Filter via Tab Groups	Subpanels in the module's detail view can be filtered into tab groups by selecting the pre-defined tabs above the subpanels. The subpanel grouping is configured by the administrator via Admin > Configure Module Menu Filters.	Subpanels in the record view cannot be filtered by tab groupings and the Configure Module Menu Filters option is not available in the Administrations page.
	History Subpanel	History subpanel lists tasks, calls,	There are now individual Calls,

		and meetings that have taken place or are completed. In addition, it displays related notes and emails to the record. The subpanel appears beneath the record's fields in the detail view.	Meetings, Tasks, Notes, and Emails subpanels available in the module's record view. The History dashlet consists of separate tabs displaying completed calls and meetings as well as related emails for records. The dashlet is available in the Record View's intelligence pane and user's Home page.
	Homogeneous Collections	Subpanels such as History and Activities may contain records belonging to multiple modules.	Subpanels may only contain records from a single module which prevents History and Activities subpanels from being present.
System Settings	Favicon	The "Display module icon as favicon" option can be enabled via Admin > System Settings to display each module's icon in the browser's navigation tab.	Favicon cannot be customized to display the module icon in the browser's navigation tab.
Themes	Admin Themes Configuration	Administrators can select the default theme (e.g. Pacific, Amore, etc.) in Sugar as well as configure which themes are available to users via Admin > Themes.	Configuration of themes (e.g. Accessibility, Amore, Eco, etc.) is not available for administrators.

	User Themes Configuration	Users can change the look and feel of Sugar's user interface by selecting one of the themes (e.g. Pacific, Amore, etc.) available in the Themes tab of their user preferences.	Configuration of themes (e.g. Accessibility, Amore, Eco, etc.) is not available for users.
User Interface	Activity Stream	- My Activity Stream dashlet on the Home page lists activities performed by other team members (e.g. created new lead, etc.) and the actions that took place related to the various modules. - User can view and post activity feeds for associated teams. - User can delete personal posts and comments via Activity Stream dashlet.	- The "Activity Stream" can be accessed via the Home page, List View, and Record View. It lists activities performed on records and allows users to create posts, preview posts, comment on posts, etc. - In addition, the My Activity Stream dashlet can also be added to dashboards on the Home page, List View, and Record View. - Home page activity stream posts do not respect teams and will be viewable by all users. - User cannot

			delete personal posts and comments from the Activity Stream.
Display Type Designation for Layouts	Administrators can set the display type as panel or tab for Edit View and Detail View layouts via Admin > Studio.	Upon upgrade to 7.7.x, Sidecar modules' record view's display type (panel or tab) will be based on the display type of detail view in Sugar 6.5.x. Edit view's display type will be disregarded. For example, if Contacts' Edit View layout was set to "Panel" while Detail View layout was set to "Tab", then the Contacts record view layout in 7.7.x will use tabs.
Edit Created By	The Created By field can be edited by users in the Edit View layout.	The Created By field cannot be edited in the Record View layout.
Field Level Security	Hidden fields due to a role restriction is not displayed in the module's detail view for user's who do not have view access.	The label for hidden fields will continue to display in the module's record view. The hidden field will indicate "No Access" in the field for user's with no view access.
Field Placement in Layouts	Fields such as "Assigned to" and "Teams" are located in the Other panel/tab in the	Upon upgrade, the fields may be located in a different panel/tab (e.g. Business Card,

		Edit View and Detail View layouts.	Show More) on the record view layout. For example, "Assigned to" and "Teams" may be located in the Business Card or Show More panel.
	Help	The Help icon appears in Sugar's footer and is a context-aware link to the documentation relevant to the module (e.g. Contacts) you are viewing.	The context-sensitive Help dashboard appears in Sidecar modules' intelligence pane and includes a link to the documentation relevant to the module you are viewing. Users may click the Help icon in Sugar's footer to open or close the Help dashboard.
	Intelligent Subpanel Filters	When relating records via the Contacts subpanel of a module's detail view (e.g. Opportunities), the pop-up window is automatically filtered to only display contact records associated to the module's parent account.	When relating records via the Contacts subpanel of a module's record view (e.g. Opportunities), the Search and Add Contacts drawer is not filtered by the module's parent account and will display all contact records in the search result.
	Merge Duplicates	Users can merge duplicate records across various field types in Sugar.	Duplicate merge does not support Password, Date Created, and Date Modified fields.
	Navigation Bar	The top navigation	The navigation bar

(Module Grouping)	bar can be filtered by a specific tab grouping (e.g. Sales, Marketing, etc.) by clicking the More tab then hovering on the "Filter Menu By". The module grouping is configured by the administrator via Admin > Configure Module Menu Filters.	cannot be filtered by tab groupings as the Configure Module Menu Filters option in the Administration page is not available.
Navigation Bar Quick Create	Custom modules appear in Admin > Configure Navigation Bar Quick Create where administrators can control which modules are enabled/disabled for the Quick Create menu.	Custom modules do not appear in Admin > Configure Navigation Bar Quick Create.
Notifications	The notifications indicator will appear in the navigation bar to notify administrators of system or configuration warnings with links to the appropriate section in Sugar to remedy the situation.	The notification indicator will appear in the navigation bar to inform administrators and users of any notification(s) specific to them. Click "View Notifications" to view all notifications pertaining to you via the Notifications list view and manage them accordingly.
Record View	The Name field can	

	Header	be removed from the Edit View/Detail View layout via Admin > Studio.	- Any modules that do not include the Name field in the layout will have the stock Name field appear upon upgrade in the record view's header pane for Sidecar modules. - The record view's header pane is not configurable via Admin > Studio.
	Tour	The Welcome to Sugar window launches upon initial login to display recent additions to Sugar. Users can click the "Take the tour" button in the window to launch the tour.	The Welcome to Sugar tour launches upon initial login to show key features of Sidecar modules (e.g. Accounts, Contacts, etc.) utilizing the new user interface. Users can click the Tour icon in Sugar's footer to launch the tour anytime upon user request.
Workflow Management	Workflow Process	Administrators can create workflows based on the Knowledge Base module via Admin > Workflow Management.	Workflows based on the Knowledge Base module will not work after upgrading to 7.7.x. Administrators will need to re-create all workflows based on the Knowledge Base module after the upgrade.

Post-Upgrade Issues

The following issues will be resolved in future releases of Sugar 7:

- [68245](#) : Upgrading from 6.5.x or 6.7.x to 7.x causes the Calendar dashlet to be missing from the Legacy dashboard.
- [69119](#) : Any saved searches created in Sugar 6.5.x or 6.7.x will not be available after upgrading to 7.x.

The following issues will remain for all Sugar 7 releases:

- Calls List View Displays No Records : The Calls list view may not initially display records as expected after upgrading from 6.5.x or 6.7.x to 7.x. Clicking the Search button in the module will get the records to appear properly in the list view again.
- Website Field Not Supported for Search : The Website field will be missing from search for instances upgraded from 6.5.x or 6.7.x to 7.x if the field was enabled for search prior to upgrade. Website field is not available to add to the Search layout via Studio.

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