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# **What to Expect When Upgrading to 10.3 (Q1 2021)**

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# What to Expect When Upgrading to 10.3 (Q1 2021)

## Overview

Upgrades to Sugar 10.3 (Q1 2021) are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 10.3 (Q1 2021).

For the upgrade, please keep in mind that there are some key features of 10.2.x that have changed or are not available in Sugar 10.3.x. Some of the items that are unavailable in Sugar 10.3.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 10.2.x to 10.3.x.

For information regarding new functionality available in 10.3.x, please refer to the release notes specific to your Sugar product:

- [Sugar Sell 10.3 Release Notes](#)
- [Sugar Serve 10.3 Release Notes](#)
- [Sugar Ultimate 10.3 Release Notes](#)
- [Sugar Enterprise 10.3 Release Notes](#)
- [Sugar Professional 10.3 Release Notes](#)

## Feature Disparity Between 10.2.x and 10.3.x

10.2.x features in the following categories have changed or are no longer available in 10.3.x:

- [Administration](#)
- [Dashboards and Dashlets](#)
- [Notes](#)
- [SugarBPM](#)
- [Sugar Sell - Renewals](#)
- [Sugar Serve - SugarLive](#)
- [User Interface](#)

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

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## Administration

The following 10.2.x Administration features and behaviors have changed in 10.3.x:

<b>Feature</b>	<b>Sugar 10.2 Behavior</b>	<b>Sugar 10.3 Behavior</b>
Role Management	"View" permission is labeled "View" in the Roles table.	"View" permission is labeled "Record View" in the Roles table.
Studio	The following field types can be enabled for mass updating: date, datetime, dropdown, multiselect, radio, relate, flex relate, tags.	The following field types can be enabled for mass updating: checkbox, date, datetime, decimal, dropdown, encrypt, float, Iframe, integer, multiselect, phone, radio, relate, text, URL.
	Relationship-based relate fields cannot be edited in Studio.	Relationship-based relate fields are in the module's Fields list in Studio, where you can adjust their settings.
System Settings	The setting that displays phone numbers in Sugar as clickable links is called "Enable SkypeOut integration".	The setting that displays phone numbers in Sugar as clickable links is called "Enable Click-to-Call".

## Dashboards and Dashlets

The following 10.2.x Dashboard features and behaviors have changed in 10.3.x:

<b>Feature</b>	<b>Sugar 10.2 Behavior</b>	<b>Sugar 10.3 Behavior</b>
Consoles	There is a pre-defined list of filters available to select when configuring the tabbed module list views (e.g. Accounts, Cases) for the Renewals Console and/or Service Console.	Administrators can control the fields available as filters for the tabbed module list views in the Renewals Console and/or Service Console by configuring the Search layout in Admin > Studio.

Dashboard Configuration	The dashboard actions menu appears on dashboards (e.g. Home page dashboard, list view/record view dashboard, console dashboard) throughout Sugar and allows you to perform various actions such as creating dashboards, duplicating dashboards, and adding dashlets.	The floating actions button appears on dashboards (e.g. Home page dashboard, list view/record view dashboard, console dashboard) throughout Sugar and replaces the dashboard actions menu for common tasks such as creating dashboards, duplicating dashboards, and adding dashlets.
Dashlet Configuration	Dashlets can be resized by dragging their lower right corner.	Dashlets can be resized by dragging their sides, bottom, or corners.

## Notes

The following 10.2.x Notes features and behaviors have changed in 10.3.x:

Feature	Sugar 10.2 Behavior	Sugar 10.3 Behavior
Attachments	Notes can only have one file attached in Sugar and the portal; the file is shown in the Attachment field, which is displayed by default in record view and list view.	Notes can have multiple files attached in Sugar and the portal; all files are shown in the Attachments field, including files originally saved in the deprecated Attachment field in Sugar 10.2 and lower. The new field is displayed by default in record view but is not available to be added to list view, and the deprecated field is hidden.
	When copying a note record, its file attachment is carried over to the duplicated record.	When copying a note record, its file attachments are not carried over. To include the same attachments on the duplicated record, you

		must save them to your computer and upload them to the new note separately.
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## SugarBPM

The following 10.2.x SugarBPM features and behaviors have changed in 10.3.x:

Feature	Sugar 10.2 Behavior	Sugar 10.3 Behavior
Process Definitions	Process definitions targeting the Notes module that are triggered on note creation will initiate a single process when a note is created with an attachment.	Process definitions targeting the Notes module that are triggered on note creation will initiate multiple processes if the note that is created has one or more attachments. To avoid this, add the following filter to the Start event's criteria: "Is Attachment = False".

## Sugar Sell - Renewals

The following 10.2.x features and behaviors related to renewals in Sugar Sell have changed in 10.3.x:

Feature	Sugar 10.2 Behavior	Sugar 10.3 Behavior
Renewals	The Renewal field, a read-only checkbox that automatically gets checked during renewal generation, exists only in the Opportunities module.	The Renewal field, a read-only checkbox that automatically gets checked during renewal generation, exists in the Opportunities, Revenue Line Items, Quotes, Quoted Line Items, and Purchased Line Items modules. The only layout it has been added to is the

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	Purchased Line Items record view.
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## Sugar Serve - SugarLive

The following 10.2.x SugarLive features and behaviors have changed in 10.3.x:

<b>Feature</b>	<b>Sugar 10.2 Behavior</b>	<b>Sugar 10.3 Behavior</b>
SugarLive Calls and Messages	After the agent or the customer ends a call or chat, a Create drawer appears for the agent to confirm values and save the call or message record.	When a call or chat is started, the call or message record is automatically created and its values are updated throughout the session. When the agent or the customer ends the session, the record is updated with the final details, and no Create drawer is presented.
SugarLive Layout	SugarLive is divided into two panels: the Detail panel containing a tabbed dashboard on the right and the Communication panel displaying the ongoing call or chats on the left.	SugarLive is divided into three panels: the Detail panel on the right, the Communication panel on the bottom left, and the new Summary panel, displaying fields from the call or message record for the current SugarLive session, on the top left.
SugarLive Communication panel	When you end a chat, the Communication panel shows the Close Contact button but no longer shows the chat conversation.	When you end a chat, the Communication panel shows the Close Contact button and the chat conversation remains visible.
SugarLive Summary panel	SugarLive saves call and message records once at the end of the call or chat session.	SugarLive updates call and message records every time a change is made to them in the <a href="#">Summary panel</a> during a call or chat. If you have

		process definitions that are triggered when a call or message record is updated, they could potentially have a negative performance impact. To reduce this risk, it is recommended to ensure that these process definitions have specific enough criteria that they will not be triggered every time the fields in the Summary panel are updated by an agent.
Amazon Connect Settings	The Instance Name field is used to construct the URL to the Contact Control Panel (CCP) in your Amazon Connect instance.	If you fill in the Contact Control Panel URL field, this URL is used to connect Sugar to your Amazon Connect instance, even if a value is provided in the Instance Name field. If you leave Contact Control Panel URL blank and populate Instance Name instead, the instance name value is used to construct the URL to the Contact Control Panel (CCP) in your Amazon Connect instance.

## User Interface

The following 10.2.x User Interface features and behaviors have changed in 10.3.x:

Feature	Sugar 10.2 Behavior	Sugar 10.3 Behavior
Editing Fields	When switching from record view to edit mode, the size of text-input boxes is reduced, requiring the user to expand the field or scroll to view longer	When switching from record view to edit mode, the size of text-input boxes is preserved, so text boxes that were expanded in record view remain



	content.	expanded on edit.
Filters	Filters on a user field can return only active users.	By default, filters on a user field will return only active users, but you may now apply a secondary filter to filter by an inactive user as well.
Phone Number fields	Phone number fields can be clicked to dial the number using your default computer telephony integration (CTI) software if the admin has enabled the "Enable SkypeOut integration" setting and the phone number uses an accepted format.	Any phone number format can be dialed provided your default computer telephony integration (CTI) software accepts the format and the re-named "Enable Click-to-Call" system setting has been enabled in Sugar by your administrator.  <b>Note:</b> For Sugar Serve users who are logged in to Amazon Connect, phone numbers will be dialed using SugarLive.
Record View	Clicking and dragging to copy a field's value from record view puts the record in edit mode.	Record-view mode is maintained when a user clicks and drags is initiated within a record, allowing for copying of text to system clipboard.

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