What to Expect When Upgrading to 12.1 (Q3 2022)

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Overview

Upgrades to Sugar 12.1 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 12.1 (Q3 2022).

When preparing for your upgrade, please keep in mind that there are some key features of 12.0 (Q2 2022) that have changed or no longer available in Sugar 12.1.x. Some of the items that are unavailable in Sugar 12.1.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 12.0.x to 12.1.x.

For information regarding new functionality available in 12.1.x, please refer to the release notes specific to your CRM solution licenses (e.g., Sugar Serve):

- Sugar Sell 12.1 Release Notes
- Sugar Serve 12.1 Release Notes

Feature Disparity Between 12.0.x and 12.1.x

12.0.x (Q2 2022) features in the following categories have changed or are no longer available in 12.1.x (Q3 2022):

- Administration
- Forecasts
- Report Results View

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

Administration

The following 12.0.x Administration behaviors have changed in 12.1.x:

Feature	Sugar 12.0 Behavior	Sugar 12.1 Behavior
Assignment Notification	The Assignment	The Assignment

Emails template	Notification Emails template is available in the Email Templates module and can be modified by administrators, but inserted variables do not work as expected.	Notification Emails template is not available to be edited.
REST service updates	REST service failures are logged at the ERROR level in sugarcrm.log.	REST service failures are logged at the FATAL level to help with troubleshooting and capturing failures.

Forecasts

The following 12.0.x Forecasts behaviors have changed in 12.1.x:

Feature	**Sugar 12.0 Behavior**	**Sugar 12.1 Behavior**
Forecast settings	The forecast configuration settings can be accessed via the Settings option in the Commit button's Actions menu or via Admin > Forecasts.	The forecast configuration settings can be accessed via the Forecast Settings option in the Forecasts module tab or via Admin > Forecasts.
Forecast tabs	The Forecasts module displays the worksheet in a single view. Team forecast worksheets show the team and seller commitments while seller forecast worksheets show a list of the individual's revenue line items and their commitment and forecast data.	The Forecasts module displays the worksheet in a tabbed view. The Opportunity Review tab shows a list of opportunities, with team forecasts showing opportunities belonging to all members of the team and seller forecasts showing opportunities belonging to just that seller. In the Commitment tab, team forecast worksheets show the team and seller

		commitments while seller worksheets only show the individual's commitment and forecast data.
Rearranged worksheet elements	The Time Period selector in the forecasting worksheet is located on the left side, below the person or team selector. The Commitment and Quota values are displayed below the Commit button.	The Time Period selector in the forecasting worksheet is located at the top of the page, next to the person or team selector. The Commitment and Quota values are displayed across the top, next to the person or team and time period selectors.
Worksheet list view	The seller's forecasting worksheet shows a list of revenue line items that cannot be edited within the worksheet. The Displayed Total and Overall Total fields show the sums of the visible and complete list of revenue line items' Likely, Best, and Worst fields at the bottom.	The seller's forecasting worksheet shows a list of opportunities that can be edited directly within the worksheet by managers and sellers. The Displayed Total and Overall Total fields are not shown.
Worksheet columns	Admins can configure the columns displayed in the forecasting worksheet via the Forecast Settings page and regular users can hide specific columns within the worksheet.	Admins can configure the columns displayed in the forecasting worksheet's Opportunity Review tab by configuring the list view layout for the Opportunities module in Studio. Regular users can adjust the columns displayed via the worksheet list view or the Opportunities module and the changes will take effect in both places.
Forecast field	The field that represents	The field that represents

	whether or not an opportunity or revenue line item is included in the forecast is called "Forecast".	whether or not an opportunity or revenue line item is included in the forecast is called "Forecast Stage".
Forecasted field	The forecasting worksheet shows the Forecasted field, which contains the sum of the revenue line items' Likely field for line items that are classified as included.	The forecasting worksheet shows the Opportunity Forecast and Revenue Line Item Forecast fields. The former contains the sum of the opportunities' Likely field for opportunities that are classified as included and the latter contains the sum of the line items' Likely field for line items that are classified as included.
Committing worksheet changes	Sellers can save their opportunity or revenue line item changes as a draft, which means that managers viewing their reportees' worksheets only see the state of the values at the last time the seller clicked the Commit button.	Sellers cannot save their opportunity or revenue line item changes as a draft; all changes are saved and committed immediately instead. Managers viewing their reportees' worksheets see the current, actual state of the values whether or not the seller has clicked "Commit".
Last commitment	The amount that was last committed is displayed in the collapsible commitment history panel.	The amount that was last committed is displayed in the Last Commitment field within the Commitment tab.
Exporting forecasts worksheet	When viewing an individual seller's forecast worksheet, you can export a CSV of the worksheet data using the Export CSV option under the Commit button's Actions menu.	When viewing an individual seller's forecast worksheet, you can export a CSV of the worksheet data using the Mass Actions menu in the Opportunity Review tab's list view.

Report Results View

The following 12.0.x Report Results View behaviors have changed in 12.1.x:

Feature	**Sugar 12.0 Behavior**	**Sugar 12.1 Behavior**
Reports detail view converted to Sidecar	The Reports detail view uses the legacy user interface.	The Reports detail view has been updated to use the Sidecar user interface and is referred to as the report results view.
Reports actions menu	Click the down arrow on the upper left of the report's detail view to open the Actions menu.	Click the three-dots menu on the upper right of the report's results view to open the Actions menu.
Refreshing report results	Click the Run Report button on the report's detail view to refresh the results.	Click the Refresh button on the upper right of the report's results view to refresh the results.
Customizable view	The charts and data table cannot be rearranged, resized, or collapsed (for certain report types) in the Reports detail view.	The chart, data table, and filter panels can be rearranged, resized, and collapsed in the report's results view.
Report details	The report details (e.g., Name, Type, Assigned to) display on the report's detail view by default.	The report details can be viewed by clicking the report's Actions menu and selecting "Report Details".
Report filters	The report's applied filters can be viewed in the Report Details panel on the report's detail view. Any run-time filters will appear in the Run-time Filters section where you can change the filter values directly from the report view.	The report's applied filters can be viewed by clicking "Advanced Filters" on the upper right of the Filters panel. Any run-time filters will appear directly on the Filters panel.
	Edit the report filters by selecting "Edit" from the Actions menu.	Edit the report filters by selecting "Edit Filters" from the Filters panel

		Actions menu or selecting "Edit" from the report's Actions menu.
	To reset the run-time filter back to the original filter values, click the Reset button in the Run-time Filters panel on the report's detail view.	To reset the run-time filter back to the original filter values, click the Filters panel Actions menu then select "Reset to Default Filters".
Printing Reports as PDFs	Choose "Print as PDF" from the Actions menu to download the report as a PDF file.	Choose "Export" from the report's Actions menu, then select "PDF" to download the report as a PDF file.
Create/view report schedules	To schedule reports for email delivery, select "Create Schedule" from the report's Actions menu. To view any scheduled reports related to the current report, select "View Schedules" from the Actions menu.	To create a report schedule or view related scheduled reports, select "Report Schedules" from the report's Actions menu.

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