What to Expect When Upgrading to 10.2 (Q4 2020)

What to Expect When Upgrading to 10.2 (Q4 2020)

Overview

Upgrades to Sugar 10.2 (Q4 2020) are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 10.2 (Q4 2020).

For the upgrade, please keep in mind that there are some key features of 10.1.x that have changed or are not available in Sugar 10.2.x. Some of the items that are unavailable in Sugar 10.2.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 10.1.x to 10.2.x.

For information regarding new functionality available in 10.2.x, please refer to the release notes specific to your Sugar product:

- [Sugar Sell 10.2 Release Notes](#)
- [Sugar Serve 10.2 Release Notes](#)
- [Sugar Ultimate 10.2 Release Notes](#)
- [Sugar Enterprise 10.2 Release Notes](#)
- [Sugar Professional 10.2 Release Notes](#)

Feature Disparity Between 10.1.x and 10.2.x

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

- [Administration](#)
- [Dashboards and Dashlets](#)
- [Product Catalog](#)
- [Purchased Line Items](#)
- [Quoted Line Items](#)
- [Revenue Line Items](#)
- [SugarIdentity](#)
- [User Interface](#)

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

Administration

The following 10.1.x Administration features and behaviors have changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Security	Sugar only supports basic authentication for Gmail and Microsoft Exchange when configuring the outbound system and/or user email accounts, which requires the username and password information to be entered to connect to the mail provider.	Sugar supports OAuth2 connections to Google Mail and Exchange Online when configuring the outbound system email account, user email accounts, as well as inbound email accounts. Customers with existing Google or Microsoft Exchange email configurations in Sugar are encouraged to update their email settings by configuring the Google or Microsoft connector via Admin > Connectors to re-establish their email accounts using the new Google/Exchange Online options as they are more secure. Eventually, both Google and Microsoft will end support for the "old" basic authentication access. For more information, refer to the announcements on Microsoft Tech Community and G Suite Updates.
Sugar Logic	Passing a mulitselect field as a second parameter in the isInList() formula does not work.	Admin users can now pass a mulitselect field as a second parameter in the isInList() formula.

Job Scheduler	Stock schedulers may have end dates of December 31, 2020.	Upgraded instances will have the end date values removed from stock schedulers that have an end date of December 31, 2020.

Dashboards and Dashlets

The following 10.1.x Dashboard behaviors have changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Dashboards	Dashboard layout includes up to 10 rows of dashlets, and dashlets are fixed size.	Dashboard layout is grid-based with an unlimited number of dashlets, and each dashlet can be resized independently by admin users and dashboard owners.
	Dashboard name changes are made by selecting Edit from the dashboard Actions menu.	Dashboard name changes are made by clicking the dashboard name to put it in edit mode, and changes are saved when the focus is shifted away from the name. The Edit option has been removed from the dashboard Actions menu.
Dashlets	The Active Subscriptions dashlet is available in the Accounts record view dashboard and included in the Renewals console by default.	The Active Subscriptions dashlet is available in all record view dashboards where the module has a relationship to Accounts, is included in the Renewals console by default, and is available to add to the Service Console Case Detail drawer.
	The Interactions dashlet is not available for the Contacts module.	The Interactions dashlet is available for the Contacts module. In addition, for Sugar Serve users, it

		includes [message records](#) for the Contacts and Cases modules so that users can add and view related messages.

IBM Notes Plug-in

The following 10.1.x Dashboard behaviors have changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Download file	The IBM Notes Plug-in is available to download via the Downloads tab in the user's profile.	The IBM Notes Plug-in is no longer available to download via the Downloads tab in the user's profile. **Note**: As of August 30, 2020, support for the Sugar Plug-in for IBM Notes has ended. For more information, refer to this [SugarClub](#) post.

Product Catalog

The following 10.1.x Product Catalog behavior has changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Field changes	The Service Duration field on line item records cannot be modified when there is a product catalog record selected.	The Service Duration field on line item records can be modified if the selected product catalog record does not have the Lock Duration field checked. On upgrade, all product catalog items marked as a "Service" will have "Lock Duration" checked.

Purchased Line Items

The following 10.1.x Purchased Line Items behavior has changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Field changes	The Calculated Revenue field is based on the unit price, quantity, and discount values.	The Calculated Revenue field is based on the unit price, quantity, service duration, and discount values.

Quoted Line Items

The following 10.1.x Quoted Line Items behavior has changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Field changes	The relate field for the Product Catalog module on the Quoted Line Items record view is named "Line Item".	The relate field for the Product Catalog module on the Quoted Line Items record view is named "Product".
	The Subtotal and Line Item Total fields are based on the unit price, quantity, and discount values.	The Subtotal and Line Item Total fields are based on the unit price, quantity, service duration, and discount values.
	A quoted line item's service end date value updates based on the service start date and duration.	A quoted line item related to a purchased line item via coterminous add-on (i.e. Add On To field) has a fixed value for its service end date.

Revenue Line Items

The following 10.1.x Revenue Line Items behaviors have changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Field changes	The Associated Quote field	The Associated Quote field

	is on the Revenue Line Items record view by default.	is renamed to "Primary Quote" and is not on the Revenue Line Items record view by default.
	The Calculated Amount field is based on the unit price, quantity, and discount values.	The [Calculated Amount](#) field is based on the unit price, quantity, service duration, and discount values.
Inheritance of field values	Renewal revenue line items inherit Currency, List Price, Cost Price, and Unit Price values from the original revenue line item.	If related to a product catalog record, renewal revenue line items inherit Currency, List Price, Cost Price, and Unit Price values from the product catalog record.
	A revenue line item's service end date value updates based on the service start date and duration.	A revenue line item related to a purchased line item via coterminous add-on (i.e. Add On To field) has a fixed value for its service end date.
Quote generation	Each individual revenue line item may be used to generate a quote only once.	Each individual revenue line item may be used to generate a quote multiple times.

SugarIdentity

The following 10.1.x SugarIdentity features have changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Cloud Settings	The SugarIdentity service is managed via the Cloud Settings console.	"Cloud Settings" has been renamed to "SugarCloud Settings".
	To access the Cloud Settings console, the admin must select "Create New User" or navigate to Admin > Password Management.	The SugarCloud Settings link is available on the Admin page for admins to easily access the SugarCloud Settings console.

Updating users	The Import Users option is not available in SugarIdentity-enabled instances to update existing user records.	The Import Users option has been reinstated to allow admins to update existing user records via import for SugarIdentity-enabled instances.

User Interface

The following 10.1.x User Interface features and behaviors have changed in 10.2.x:

Feature	Sugar 10.1 Behavior	Sugar 10.2 Behavior
Checkbox fields	To inline-edit a checkbox field, the user must first click on the pencil icon next to the checkbox to enable the field for editing.	To inline-edit a checkbox field, the user can click on or near the checkbox to enable it for editing.
List view filters	The default maximum number of list view filters displayed in Saved Filters is 20.	The default maximum number of list view filters displayed in Saved Filters is 50. This number can still be changed in System Settings.
Restricted fields	If a user does not have the required license type to view a particular field, the field is removed from record view.	If a user does not have the required license type to view a particular field, the field value is replaced with a placeholder containing the text "License Required".
Subpanels	In Admin > Studio > "Module Name" > Subpanels > "Module Name", the fields in the Default column are displayed for each user as a column header within the subpanel.	In Admin > Studio > "Module Name" > Subpanels > "Module Name", the fields in the Default column are available for each user to choose whether or not to display when clicking the Gear icon in the subpanel.

Last Modified: 2021-04-01 15:25:08