What to Expect When Upgrading to 11.0 (Q2 2021)

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Overview

Upgrades to Sugar 11.0 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 11.0 (Q2 2021).
- On-site 10.0.x instances have the option to upgrade to 11.0.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that there are some key features of 10.3 (Q1 2021) or 10.0 (Q2 2020) which have changed or may no longer be available in Sugar 11.0.x. Some of the items that are unavailable in Sugar 11.0.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 10.0.x or 10.3.0 to 11.0.x.

Please refer to the appropriate section of this page for your upgrade scenario.

- [Feature Disparity Between 10.3.0 and 11.0.x](): For customers who are upgrading to 11.0.x from 10.3.0
- [Feature Disparity Between 10.0.x and 11.0.x](): For customers who are upgrading to 11.0.x from 10.0.x

For additional information regarding new functionality available in 11.0.x, please refer to the [11.0 Release Notes]() specific to your Sugar product. For assistance with upgrading an on-site instance, refer to the 11.0 [Installation and Upgrade Guide]() and [Migration Guide]().

Feature Disparity Between 10.3.0 and 11.0.x

10.3.0 (Q1 2021) features in the following categories have changed or are no longer available in 11.0.x (Q2 2021):

- [Administration]()
- [Dashboards and Dashlets]()
- [Emails]()
- [Global Search]()
- [Import]()
- [Quotes and Quoted Line Items]()

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

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

Administration

The following 10.3.0 Administration behavior has changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Quotes Configuration in Sugar Mobile	Changes made via Admin > Quotes Configuration are not applied to the quotes view in Sugar Mobile.	Changes made via Admin > Quotes Configuration will apply to the quotes view in Sugar Mobile only after an admin user re-saves the configuration settings.
Job Scheduler	Some stock schedulers may have end dates.	Upgraded instances do not have end dates for any stock schedulers.
Content Security Policy Settings	Users can display external web content in iframes and Web Page dashlets subject only to their hosting environment's restrictions and protocols.	Sugar prevents any external web content from loading in iframes and/or Web Page dashlets until the administrator adds the web domain as a trusted site in the new Content Security Policy Settings. On upgrade, any existing iframe fields and/or Web Page dashlets will likely show an error message if the URL is not a trusted site. To restore the web content, the administrator must add the URL (e.g. https://example.com) as a trusted site via Admin > Content Security Policy Settings. Once saved, users should refresh their

		browsers for the changes to take effect.
Studio field options	Administrators can make fields conditionally required in Admin > Studio, but the fields do not work as expected when added to legacy modules: "Documents" and "Campaigns".	Fields that are conditionally required work as expected in legacy modules.

Dashboards and Dashlets

The following 10.3.0 Dashboards and Dashlets behavior have changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Interactions dashlet	The Interactions dashlet is available to add to the Accounts, Cases, Contacts, Leads, and Opportunities record views.	The Interactions dashlet is available to add to the Accounts, Cases, Contacts, Leads, Opportunities, and Quotes record views.
Record View dashboards	The Record View dashboard displays a pre-defined set of dashlets for most Sidecar modules. There are certain modules such as "Emails" which do not have the Record View dashboard configured out-of-the-box.	The out-of-the-box Record View dashboards have been enhanced to display a new pre-defined set of dashlets in Sugar 11.0. If there are any Record View dashboards that are empty by default, the dashboard will be updated to display the new pre-defined set of dashlets after upgrading to 11.0. If there are any Record View dashboards that have been deleted for a module and are empty, the dashboard will not be updated during the upgrade.

Emails

The following 10.3.0 Emails behavior has changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Email Templates module converted to Sidecar	The Email Templates module is a legacy module.	The Email Templates module is a Sidecar module.

Global Search

The following 10.3.0 Global Search behavior has changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Global Search results	Global Search searches all knowledge base articles, including those that are not published or are expired.	Global Search searches only published and not-expired articles.

Import

The following 10.3.0 Import behavior has changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Created By Field	When importing records, the Created By field does not adhere to CSV values or import preferences and shows as blank for both new and updated records.	When importing records, the Created By field respects CSV values and import preferences and shows as either the CSV value or the original user for both new and updated records.

Quotes and Quoted Line Items

The following 10.3.0 Quotes and Quoted Line Items features and behavior have changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Discount Amount field	Discount Amount and Discount Type are two fields on the Quoted Line Item record view used together when applying a discount to the record.	Discount Type has been removed and Discount Amount includes the ability to designate the discount as either a flat amount or a percentage.
Quotes Worksheet	The column on the Quotes worksheet for the related product catalog or custom item(s) is labeled "Line Item".	The column on the Quotes worksheet for the related product catalog or custom item(s) is labeled "Product".

SugarBPM

The following 10.3.0 SugarBPM features and behavior have changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Teams field evaluation	When designing process definitions, the Teams field can only support one value.	When designing process definitions, the Teams field is now a multiselect field.
SugarBPM exclude list	The mkto_lead_score and mkto_sync fields are in the exclude list for SugarBPM and cannot be used when designing process definitions.	The mkto_lead_score and mkto_sync fields are not in the exclude list for SugarBPM and can be used when designing process definitions.
Date and datetime fields	It is not possible to compare date and datetime fields in process business rules.	It is possible to compare date and datetime fields in process business rules. When doing so, the time portion of the datetime field is ignored.

SugarLive

The following 10.3.0 SugarLive features and behavior have changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Amazon Connect Settings	To connect Sugar with your Amazon Connect instance, you can either populate the Contact Control Panel URL field or the Instance Name field. If you choose to use the Instance Name field, Sugar constructs the URL from the provided name.	To connect Sugar with your Amazon Connect instance, you must populate the required Contact Control Panel URL field in Sugar. The Instance Name field is no longer used to construct the URL. If you have populated the Instance Name field prior to upgrading from 10.3 to 11.0, Sugar will fill in the Contact Control Panel URL field with the URL constructed from the instance name upon upgrade. If SugarLive does not work after upgrade, confirm that the Contact Control Panel URL field is populated correctly.

User Interface

The following 10.3.0 User Interface features and behavior have changed in 11.0.x:

Feature	Sugar 10.3 Behavior	Sugar 11.0 Behavior
Search	You can search contacts and cases by their account name in list view and the Console List View dashlet.	You cannot search contacts and cases by their account name in list view and the Console List View dashlet.
Filter (list view search)	The filter button and menu item labels to create a new filter in Sidecar	The filter button and menu item labels to create a new filter in Sidecar

	modules are "Create".	modules are "Build Filter".

Feature Disparity Between 10.0.x and 11.0.x

10.0.x features in the following categories have changed or are no longer available in 11.0.x:

- [Administration](#)
- [Calls and Meetings](#)
- [Campaigns](#)
- [Dashboards and Dashlets](#)
- [Emails](#)
- [Global Search](#)
- [Import](#)
- [Notes](#)
- [Opportunities and Revenue Line Items](#)
- [Quotes and Quoted Line Items](#)
- [SugarBPM](#)
- [User Interface](#)

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

Administration

The following 10.0.0 Administration behavior has changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
"Sugar Connect" Admin page section	The Sugar Connect section of the Admin page contains the "License Management", "Sugar Updates", and "Online Documentation" sections.	The Sugar Connect section has been removed from the Admin page. The "License Management" and "Sugar Updates" sections have been moved to the System section of the Admin page. The online documentation can be accessed by clicking the Help link in Sugar's footer.
"Validate user IP address" setting	The "Validate user IP address" setting is	Out-of-the-box, the "Validate user IP address"

	enabled by default in Admin > System Settings.	setting is disabled by default.
"Enable additional login screen content" setting	The "Enable additional login screen content" setting is available in Admin > System Settings.	The "Enable additional login screen content" setting is not available in Sugar.
Content Security Policy Settings	Users can display external web content in iframes and Web Page dashlets subject only to their hosting environment's restrictions and protocols.	Sugar prevents any external web content from loading in iframes and/or Web Page dashlets until the administrator adds the web domain as a trusted site in the new [Content Security Policy Settings](#). On upgrade, any existing iframe fields and/or Web Page dashlets will likely show an error message if the URL is not a trusted site. To restore the web content, the administrator must add the URL (e.g. https://example.com) as a trusted site via Admin > Content Security Policy Settings. Once saved, users should refresh their browsers for the changes to take effect.
Job Scheduler	Some stock schedulers may have end dates.	Upgraded instances do not have end dates for any stock schedulers.
Legacy workflows	Legacy workflows based on custom modules remain in Sugar after the custom module is uninstalled.	Legacy workflows based on custom modules are removed when the custom module is uninstalled.
Quotes configuration in Sugar Mobile	Changes made via Admin > Quotes Configuration are not applied to the quotes view in Sugar Mobile.	Changes made via Admin > Quotes Configuration will apply to the quotes view in Sugar Mobile only after an admin user re-saves the configuration settings.

Role Management	"View" permission is labeled "View" in the Roles table.	"View" permission is labeled "Record View" in the Roles table.
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](#).
Studio field options	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.
	Administrators can make fields conditionally required in Admin > Studio, but the fields do not work as expected when added to legacy modules: "Documents" and "Campaigns".	Fields that are conditionally required work as expected in legacy modules.
	Admin users can add fields to layouts in Studio even if they do not have the appropriate license type to access the field.	Admin users cannot add fields to layouts in Studio if they do not have the appropriate license type to access the field. They can remove these fields if they are already on the layout, but cannot re-add them after saving and deploying.
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.
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".

Calls and Meetings

The following 10.0.x Call and Meeting modules features have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
"Repeat on Days of Week" field	When creating or editing calls and meetings with a weekly repeat type, the	When creating or editing calls and meetings with a weekly repeat type, the

	Repeat on Days of Week field defaults to the current day.	Repeat on Days of Week field defaults to the day that corresponds with the Start Date.

Campaigns

The following 10.0.x Campaigns behavior has changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
"Set Up Email" option	The Campaigns module actions menu includes the "Set Up Email" option.	"Set Up Email" is not available in the Campaigns module actions menu. The campaign email settings are still accessible in Admin > System Email Settings.

Dashboards and Dashlets

The following 10.0.x Dashboards and Dashlets behavior have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Editing 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.

	An 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 replaces the dashboard actions menu for common tasks such as creating dashboards, duplicating dashboards, and adding dashlets.
Record View dashboards	The Record View dashboard displays a pre-defined set of dashlets for most Sidecar modules. There are certain modules, such as "Emails", that do not have the Record View dashboard configured out-of-the-box.	The out-of-the-box Record View dashboards have been enhanced to display a new pre-defined set of dashlets in Sugar 11.0. If there are any Record View dashboards that are empty by default, the dashboard will be updated to display the new pre-defined set of dashlets after upgrading to 11.0. If there are any Record View dashboards that have been deleted for a module and are empty, the dashboard will not be updated during the upgrade.
Record View dashlet	The Record View dashlet layout can only be configured in Studio for the Accounts, Cases, and Opportunities modules.	The [Record View dashlet layout](#) can be configured in Studio for all supported Sidecar modules, including custom modules.

Emails

The following 10.0.0 Emails behavior has changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Email Templates	The Email Templates module is a legacy module.	The Email Templates module is a Sidecar module.

Global Search

The following 10.0.0 Global Search behavior has changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Global Search results	Global Search returns all knowledge base articles, including those that are not published or are expired.	Global Search returns only published and not-expired articles.

Import

The following 10.0.0 Import behavior has changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Created By field	When importing records, the Created By field does not adhere to CSV values or import preferences and shows as blank for both new and updated records.	When importing records, the Created By field respects CSV values and import preferences and shows as either the CSV value or the original user for both new and updated records.

Notes

The following 10.0.x Notes module features have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Attachments	Notes can only have one file attached in Sugar and	Notes can have multiple files 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.	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.
"Date Modified" and "Modified By" fields	Changed values in the Date Modified and Modified By fields are ignored on import.	Changed values in the Date Modified and Modified By fields are respected on import. When values are blank, the date of import and ID of the user performing the import populate these fields.

Opportunities and Revenue Line Items

The following 10.0.x Opportunities and Revenue Line Items behaviors have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Field changes	The revenue line item's name field is called "Revenue Line Item".	The revenue line item's name field label has been changed to "Name".
	There is a "Calculated	The "Calculated Revenue

	Revenue Line Item Amount" field in the Revenue Line Items module.	Line Item Amount" field has been renamed as "Calculated Amount".
	The "Total Discount Amount" field is on the Revenue Line Items record view and allows users to enter the discount in a flat amount.	The field has been renamed "Discount Amount" and allows users to enter the discount in a flat amount or a percentage.
	Revenue line items do not support negative "Quantity" field values.	Revenue line items support negative "Quantity" values, which can be used for credits or price adjustments.
	The Expected Close Date field on opportunities shows the latest expected close date value of all related revenue line items. In Studio, the Expected Close Date field has a calculated value using a Sugar Logic formula.	The Expected Close Date field on opportunities shows the latest expected close date value of only the open related revenue line items, until all are either "Closed Won" or "Closed Lost". In Studio, the Expected Close Date field's value is calculated internally by Sugar, not using Sugar Logic.
	The Associated Quote field is on the Revenue Line Items record view by default.	The Associated Quote field is renamed "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's calculation now factors in the service duration, too.
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.
Managing revenue line items at the opportunity level	On the opportunity record, the Sales Stage and Expected Close Date fields cannot be edited.	Expected close date, sales stage, and service start date can now be set at the opportunity level and pushed to all open related revenue line items.
Opportunities preview	The opportunity record view and preview view layouts match by default.	The order of fields on the opportunity record view does not match the order of fields on the preview view by default.
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.
Revenue Line Items subpanel	Configuration changes made in Studio for the Revenue Line Items subpanel layout in the Opportunities module do not apply to the Revenue Line Items subpanel in the opportunities create view.	The Revenue Line Items subpanel in the opportunities create view respects the customizations made in Studio for the Revenue Line Items subpanel layout in the Opportunities module.

Quotes and Quoted Line Items

The following 10.0.0 Quotes and Quoted Line Items features and behavior have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 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".
	Discount Amount and Discount Type are two fields on the Quoted Line Item record view used	Discount Type has been removed and Discount Amount includes the ability to designate the

	together when applying a discount to the record.	discount as either a flat amount or a percentage.
	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.
	Quoted line items do not support negative "Quantity" field values.	Quoted line items support negative "Quantity" values, which can be used for credits or price adjustments.
Quotes Worksheet	The column on the Quotes worksheet for the related product catalog or custom item(s) is labeled "Line Item".	The column on the Quotes worksheet for the related product catalog or custom item(s) is labeled "Product".

SugarBPM

The following 10.0.0 SugarBPM features and behavior have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Process definitions for Notes	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".
Round Robin	SugarBPM Round Robin actions assign records to users in the same order every time.	SugarBPM Round Robin actions can be configured to assign records to users based on the users' availability.
SugarBPM exclude list	The mkto_lead_score and	The mkto_lead_score and

	mkto_sync fields are in the exclude list for SugarBPM and cannot be used when designing process definitions.	mkto_sync fields are not in the exclude list for SugarBPM and can be used when designing process definitions.
Teams field evaluations	When designing process definitions, the Teams field can only support one value.	When designing process definitions, the Teams field is a multiselect field.
Date and datetime fields	It is not possible to compare date and datetime fields in process business rules.	It is possible to compare date and datetime fields in process business rules. When doing so, the time portion of the datetime field is ignored.

User Interface

The following 10.0.0 User Interface features and behavior have changed in 11.0.x:

Feature	Sugar 10.0 Behavior	Sugar 11.0 Behavior
Comment Log	Users are not notified when mentioned in a Comment Log entry.	Users can choose to receive email notifications when mentioned in a Comment Log entry.
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 content.	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 expanded on edit.
	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.
	Hyperlinks in text area fields appear as plain text and are not clickable.	Hyperlinks (e.g. www.sugarcrm.com) in text area fields are

		clickable and will open the link in a new tab.
	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.
	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. **Note**: For Sugar Serve users who are logged in to Amazon Connect, phone numbers will be dialed using SugarLive.
	If a user does not have the required license type to view a particular field, the field is still displayed on 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".
List view	The filter button and menu item labels to create a new filter in Sidecar modules are "Create".	The filter button and menu item labels to create a new filter in Sidecar modules are "Build Filter".
	In list view, opening/closing the intelligence pane or resizing the browser window resets column widths to their default settings.	In list view, user-defined column widths are preserved when opening/closing the intelligence pane or resizing the browser window.
	The default maximum number of list view filters	The default maximum number of list view filters

	displayed in Saved Filters is 20.	displayed in Saved Filters is 50. This number can still be changed in System Settings.
	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.
	You can search contacts and cases by their account name in list view and the Console List View dashlet.	You cannot search contacts and cases by their account name in list view and the Console List View dashlet.
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.
	Subpanel filter bars are included on the Product Type, Manufacturers, Shipping Providers, and Tax Rate record views.	The Product Type, Manufacturers, Shipping Providers, and Tax Rate record views do not have subpanel filter bars.
Tile View	When a saved or stock filter is selected in tile view or in list view, it is sticky when switching between the two views. However, ad-hoc filters are not sticky when switching between tile view and list view.	An ad-hoc filter applied to the tile view will automatically apply to the module's list view and vice versa and remain sticky when switching between the two views.

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