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# **What to Expect When Upgrading to 12.2 (Q4 2022)**

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# What to Expect When Upgrading to 12.2 (Q4 2022)

## Overview

Upgrades to Sugar 12.2 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 12.2 (Q4 2022).

When preparing for your upgrade, please keep in mind that there are some key features of 12.1 (Q3 2022) that have changed or no longer available in Sugar 12.2.x. Some of the items that are unavailable in Sugar 12.2.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 12.1.x to 12.2.x.

For information regarding new functionality available in 12.2.x, please refer to the release notes specific to your CRM solution licenses (e.g., Sugar Serve):

- [Sugar Sell 12.2 Release Notes](#)
- [Sugar Serve 12.2 Release Notes](#)

## Feature Disparity Between 12.1.x and 12.2.x

12.1.x (Q3 2022) features in the following categories have changed or are no longer available in 12.2.x (Q4 2022):

- [Cloud Drive](#)
- [Dashboards and Dashlets](#)
- [Notes](#)
- [Reports](#)
- [Sugar Maps](#)
- [SugarPredict](#)

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

### Cloud Drive

The following 12.1.x Cloud Drive behaviors have changed in 12.2.x:

Feature	Sugar 12.1 Behavior	Sugar 12.2 Behavior
Doc Merge from Cloud	To merge a document and	To merge a document

Drive dashlet	upload it to the Cloud Drive dashlet on a record view dashboard, you must first perform a doc merge for an individual record, then select "Sync To OneDrive/Google Drive/Dropbox" in the Documents subpanel Actions menu to upload it to the folder that is shown in the Cloud Drive dashlet.	from the Cloud Drive dashlet on a record view dashboard, you can use the three-dots menu in the top right corner of the dashlet to choose whether to Doc Merge to "Word/Excel/Powerpoint" or "PDF" and upload the file to the folder shown in the dashlet.
Doc Merge and Send to DocuSign from Cloud Drive dashlet	To merge a document and send it to DocuSign, you must first perform a doc merge for an individual record then use the Documents subpanel to "Send to DocuSign".	To merge a document and send it to DocuSign on a record view dashboard, you can use the three-dots menu in the top right corner of the Cloud Drive dashlet then choose "DocuSign" under the "Doc Merge to" heading. A doc merge will occur and then redirect to DocuSign.
DocuSign from Cloud Drive dashlet	To send a document from your Cloud Drive dashlet to DocuSign, you must first create a Sugar Document from the Cloud Drive dashlet and then send the document to DocuSign using the subpanel Actions menu.	To send a document from your Cloud Drive dashlet to DocuSign, you can use the "Send to DocuSign" option in the Cloud Drive dashlet.

## Dashboards and Dashlets

The following 12.1.x Dashboard and Dashlets behaviors have changed in 12.2.x:

Feature	Sugar 12.1 Behavior	Sugar 12.2 Behavior
Console lists after upgrade	The admin may configure the Service and Renewals Console list views via the floating actions button to meet their organization's needs.	After upgrade, if a Service or Renewals Console list view had previously been configured by an admin, this configured view will become the first metric

		tab in that module's tab and will be named "Untitled". An admin can rename or update this metric tab and create others to further configure the view.
Console refreshing	The Service and Renewals Consoles refresh every five minutes and each list view tab can also be manually refreshed.	The Service and Renewals Consoles refresh every five minutes and the metric tabs within each list view tab can be manually refreshed. Refreshing a specific metric tab also causes all other metric tabs to refresh without reloading the page or interfering with the currently viewed tab.
Editing console list views	To edit the console list view, use the Edit Module Tabs option in the floating actions menu.	Editing the console list view is done on a per-metric-tab basis. To edit each tab, click the three-dots menu on the metric bar and select "Edit", then click the List Layout tab.
Service Console case counts	The Cases tab shows a summary of color-coded case counts at the top based on the cases' follow-up dates.	The Cases tab shows case counts for each metric tab according to the filter applied in that tab. The currently viewed metric tab also shows color-coded case counts based on the cases' follow-up dates.

## Notes

The following 12.1.x Notes behavior has changed in 12.2.x:

Feature	Sugar 12.1 Behavior	Sugar 12.2 Behavior
Notes module "Display in Portal?" field	The field in the Notes module to show the note record in the Sugar Portal	The field in the Notes module to show the note record in the Sugar Portal

	is called "Display in Portal?".	is called "Available Externally".
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## Reports

The following 12.1.x Report behaviors have changed in 12.2.x:

Feature	Sugar 12.1 Behavior	Sugar 12.2 Behavior
Report Dashlet	Report charts can be viewed on the Saved Reports Chart Dashlet.	Report charts, data tables, and filters can be viewed on the Report Dashlet.
Report results view	Data table columns can be resized.	Data table columns are set to a fixed width and cannot be resized.
	You can open the Define Filters step of the Report Wizard via either the three-dots menu in the results view or the three-dots menu in the Filters panel.	You can open the Define Filters step of the Report Wizard via the three-dots menu in the results view.

## Sugar Maps

The following 12.1.x Sugar Maps behaviors have changed in 12.2.x:

Feature	Sugar 12.1 Behavior	Sugar 12.2 Behavior
Geocode schedulers	The schedulers needed for geocoding must be created manually.	<p>The schedulers needed for geocoding are automatically created in new Sugar instances and upon upgrade. Please note that this only applies to upgrades and new instances that inherently have Sugar Maps included (i.e., Sell Premier).</p> <p>Instances using Sugar Maps as an add-on (e.g., Sell Advanced + Sugar Maps) still need to create the schedulers manually.</p>

	The geocoder scheduler "Geocoder Maps" triggers the Sugar Maps geocoding process.	The geocoder scheduler "Records Geocoder" triggers the Sugar Maps geocoding process.
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## SugarPredict

The following 12.1.x SugarPredict behavior has changed in 12.2.x:

Feature	Sugar 12.1 Behavior	Sugar 12.2 Behavior
SugarPredict for Sell fields	By default, the existing SugarPredict fields (the "Prediction" and "Ideal Customer Profile" Lead fields and the "Prediction" Opportunity field) have the Allow Imports field set to "Yes".	By default, the existing SugarPredict fields (the "Prediction" and "Ideal Customer Profile" Lead fields and the "Prediction" Opportunity field) have the Allow Imports field set to "No". If a field had been edited, the existing setting will be unchanged on upgrade.