
What to Expect When Upgrading to 9.2

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What to Expect When Upgrading to 9.2

Overview

Upgrades to Sugar 9.2 are available or required for instances according to the following guidelines:

- All instances hosted on Sugar's cloud service will be upgraded to 9.2.

For the upgrade, please keep in mind that there are some key features of 9.1.x which have changed or are not available in Sugar 9.2.x. Some of the items that are unavailable in Sugar 9.2.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 9.1.x to 9.2.x.

For information regarding new functionality available in 9.2.x, please refer to the [9.2 Release Notes](#) specific to your Sugar product.

Feature Disparity Between Summer '19 (9.1.x) and Fall '19 (9.2.x)

9.1.x features in the following categories have changed or are no longer available in 9.2.x:

- [Bugs](#)
- [Cases](#)
- [Notes](#)
- [Portal](#)
- [SugarIdentity](#)

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

Bugs

The following 9.1.x Bugs module behavior has changed in 9.2.x:

Feature	Sugar 9.1 Behavior	Sugar 9.2 Behavior
Display in Portal field	Disabled by default on records.	Enabled by default for new records. The administrator can reverse the default behavior by

		navigating to Studio > [module] > Fields and editing the default value for the field.
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Cases

The following 9.1.x Cases module behavior has changed in 9.2.x:

Feature	Sugar 9.1 Behavior	Sugar 9.2 Behavior
Display in Portal field	Disabled by default on records.	Enabled by default for new records. The administrator can reverse the default behavior by navigating to Studio > [module] > Fields and editing the default value for the field.

Notes

The following 9.1.x Notes module behavior has changed in 9.2.x:

Feature	Sugar 9.1 Behavior	Sugar 9.2 Behavior
Display in Portal field	Disabled by default on records.	Enabled by default for new records. The administrator can reverse the default behavior by navigating to Studio > [module] > Fields and editing the default value for the field.

Portal

The following 9.1.x Portal features and behavior have changed in 9.2.x:

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Feature	Sugar 9.1 Behavior	Sugar 9.2 Behavior
Portal registration	When a customer submits their portal registration form, a lead record is created in Sugar which then needs to be qualified and converted to a contact.	When a customer submits their portal registration form, a contact record is created in Sugar and its Lead Source is set to "Support Portal User Registration".
	The Sugar user assigns a username and password to the customer when activating their portal account.	Portal registrants choose their own username and password when signing up for Sugar Portal.
Adding notes	Notes are created in a flyover window in portal.	Notes are created using the full record view in portal.
Footer (UI)	The portal displays a footer at the bottom of the page with links to Support and an in-page Tour.	The portal does not display a footer or links to Support and Tour.
Global Search and Quick Create	The portal features Global Search and Quick Create functions.	Global Search and Quick Create are not available in the portal.
List views	List views have very limited search and configuration options.	Portal users can search for and filter list-view results, configure the available columns, and use a Refresh button to reload the list view.
Module visibility	Admin can hide modules from the portal via Admin > Display Modules and Subpanels.	Admin must hide modules from showing in the portal by adjusting visibility in the Support Portal role. The settings in Admin > Display Modules and Subpanels do not apply to portal.
Portal user Record Actions menu	The user's profile record in portal includes an Actions menu with the "View Personal Info" option.	The user's profile record in portal does not have an Actions menu or the option to View Personal Info.

Sugar user names	The portal shows the name of the Sugar user who created, modified, or is assigned to a record.	The portal does not show the user who created, modified, or is assigned to a record, though the dates are still visible where applicable. The admin may choose to display the name of the Assigned To user via Admin > Sugar Portal.
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SugarIdentity

The following 9.1.x SugarIdentity features have changed in 9.2.x:

Feature	Sugar 9.1 Behavior	Sugar 9.2 Behavior
Employee records	For instances that use SugarIdentity, selecting the Create Employee option directs the admin to SugarIdentity in the Cloud Settings Console.	For instances that use SugarIdentity, selecting the Create Employee option keeps the admin in the Sugar application where they can create a new employee record.
	For instances that use SugarIdentity, certain employee fields (e.g. First Name, Last Name, Title) are read-only and must be edited in SugarIdentity via the Cloud Settings console.	For instances that use SugarIdentity, employee fields can be edited directly in Sugar.

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