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What to Expect When Upgrading to 8.0

Overview

Upgrades to Sugar 8.0 are available or required for instances according to the following guidelines:

- Sugar 7.11.0.0 and 7.11.1.0 instances that are hosted on Sugar's cloud service and are not highly customized will be upgraded to 8.0.
- On-Site 7.9.4.0 instances have the option to upgrade to 8.0.

When preparing for your upgrade or deciding whether or not to upgrade, please keep in mind that there are some key features of 7.11.x and 7.9.x which have been changed or are not available in Sugar 8.0.x. Some of the items that are unavailable in Sugar 8.0.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 7.11.x or 7.9.x to 8.0.x. For information regarding changes and functionality available in 8.0.x, please refer to the 8.0 Release Notes specific to your Sugar edition.

Customers who are upgrading to 8.0.0 from Winter '18 (7.11) should refer to the following section:

- What to Expect When Upgrading From Winter '18 (7.11)

Customers who are upgrading to 8.0.0 from 7.9 should refer to the following section:

- What to Expect When Upgrading From 7.9

What to Expect When Upgrading From Winter '18 (7.11)

Feature Disparity Between 7.11.x and 8.0.x

Sugar 7.11.x features that have been changed or are no longer available in 8.0.x are as follows:

Category	Feature	Sugar 7.11.x	Sugar 8.0.x
Administration	Disabling Activity Streams	The activity stream allows users to view a list of activities	Administrators now have the ability to stop activity streams from

		performed on records, view posts, preview posts, comment on posts, etc. via the home page, My Activity Stream dashlet, module's list view/record view, and intelligence pane.	displaying or storing new entries via Admin > System Settings.
	Email Opt-Out Default	When new email addresses are added to Sugar records, they are opted-in by default.	Administrators can now configure whether new email addresses added to Sugar records default to opted-in or opted-out by using the "Opt-out new email addresses by default" option in Admin > System Email Settings.
	Name field	Stock person-type modules contain a field labeled "Name" in the application and full_name in the database.	The stock Name field has been relabeled in the database from full_name to name. As a result, list view layouts for modules that were displaying the Name field may display columns in an unexpected order after upgrading. To restore your column layouts, simply confirm and then re-deploy your layouts via Studio > {Module} > Layouts > List

			View.
Advanced Workflow	Process Definition Actions	Date fields populated by Change Field and Add Related Record actions must be set to a static date or be relative to another date field.	A Sugar date variable labeled "Run Time" has been added, which is essentially a "now" option. Run Time represents the moment that the action executes (e.g., you can change a date field to Run Time + 2 weeks).
Dashboards	Product Catalog Dashlet	For Enterprise and Ultimate editions with Revenue Line Items enabled, users can search for and select products as revenue line items from the Product Catalog via the line item's Product field.	For Enterprise and Ultimate editions with Revenue Line Items enabled, users can search for and select products as revenue line items from the Product Catalog via a line item's Product field or by using the Product Catalog dashlet on the opportunity's create and record views.
	Saved Reports Chart Dashlet	When adding or editing the Saved Reports Chart dashlet, users can choose their desired report by selecting from the list of available reports which appear in the Select a Report field.	The Select a Report field now allows users to search and select their desired report when adding or editing the Saved Reports Chart dashlet.
Emails	Opt-Out Status	The opt-out status	Email addresses

		is not readily visible for email addresses that are marked as opted-out.	that are marked as opted-out will now perpetually display the opt-out status which is indicated by a blue circle with a line through it.
User Interface	Audit Log	Users can view the history of changes to audited fields for records via the change log by selecting "View Change Log" from the record view's Actions menu.	Sugar's change log is now called "Audit Log" and it can be accessed by selecting "View Audit Log" from the Actions menu. The audit log now captures the setting of fields starting at record creation, includes the source from which each field change originated, and displays the name of the current record in the audit log header. Email addresses now have a separate audit log which can be accessed from the Audit Log page and records when the address is marked as opted-out or invalid.
		The change log is not available for the Targets module.	Users can now view a history of changes to audited fields for target records via the audit log.
Web-to-Lead	Opt-In Option	A web-to-lead form	When creating a

		can be created in Sugar and placed on an external website for visitors to complete/submit and have their information be entered as a new lead record.	web-to-lead form, an opt-in checkbox now gets added to forms containing email address fields to allow visitors to explicitly indicate that they wish to receive marketing emails. Web-to-lead forms should be re-generated to now include the opt-in field accordingly.

Feature Disparity Between 7.9.x and 8.0.x

Sugar 7.9.x features that have been changed or are no longer available in 8.0.x are as follows:

Category	Feature	Sugar 7.9.x	Sugar 8.0.x
User Interface	New Design	Sugar's Sidecar user interface utilizes dark gray text on a light-gray background, featuring heavy blacks and gray linen-look designs.	Sugar's updated design features a color palette that is friendly, modern, and bright, using Open Sans as the Sugar base font because of its compatibility with text-heavy web and mobile layouts. For more information on the UX and UI changes, please refer to the DevBlog announcement in SugarClub.
Administration	Disabling Activity Streams	The activity stream allows users to	Administrators now have the ability to

		view a list of activities performed on records, view posts, preview posts, comment on posts, etc. via the home page, My Activity Stream dashlet, module's list view/record view, and intelligence pane.	stop activity streams from displaying or storing new entries via Admin > System Settings.
	Admin Panel	The admin panel contains a link to Email Settings where the administrator can configure the system email settings.	The Email Settings option is now labeled "System Email Settings."
	Email Opt-Out Default	When new email addresses are added to Sugar records, it is opted-in by default.	Administrators can now configure whether new email addresses added to Sugar records default to opted-in or opted-out by using the "Opt-out new email addresses by default" option in Admin > System Email Settings.
	Email Settings	The administrator has the option to "Delete related notes & attachments with deleted emails" via Admin > Email Settings.	The admin option to "Delete related notes & attachments with deleted emails" has been removed. Deleting an email that contains attachments will always delete the attachments' notes

			records with the email.
	Inbound Email Fields	The administrator can enable the "Allow users to send emails using the "From" Name and Address as the reply to address" option which allows the "From" name and email address associated with the group email account to appear as an option for the From field when composing emails in Sugar for users on teams that have access to the group email account.	The functionality has been deprecated as of Sugar 7.10.x and will have no effect on 7.10 or higher versions.
	Name field	Stock person-type modules contain a field labeled "Name" in the application and full_name in the database.	The stock Name field has been relabeled in the database from full_name to name. As a result, list view layouts for modules that were displaying the Name field may display columns in an unexpected order after upgrading. To restore your column layouts, simply confirm and then re-deploy your layouts via Studio > {Module} > Layouts > List View.
Advanced Workflow	Field Changes	When creating	Start events and

	To/From Functionality	process definitions, Start events can detect that a particular field has changed and, optionally, react according to the value it changes to or from.	Receive Message events can detect that a particular field has changed and, optionally, react according to the value it changes to or from.
	Process Business Rules	The administrator cannot move rows or perform mass actions on rows in a business rule.	The Business Rules user interface has been redesigned. The UI changes allow the administrator to reorder rows via drag-and-drop and to move or delete multiple rows at a time.
	Process Definition Actions	When a process creates a new record via the Add Related Record action, the new record's assigned user does not receive a notification.	The Advanced Workflow engine respects the assignment notification settings in Sugar's System settings and in the user's profile. **Note**: To prevent duplicate notifications, administrators should consider removing assignment notifications that they may have built into process definitions via Send Message events.
		Date fields populated by Change Field and Add Related Record	A Sugar date variable labeled "Run Time" has been added, which

		actions must be set to a static date or be relative to another date field.	is essentially a "now" option. Run Time represents the moment that the action executes (e.g., you can change a date field to Run Time + 2 weeks).
Dashboards	Product Catalog Dashlet	For quotes, users can search for and select products as quoted line items from the Product Catalog on a quote's worksheet. For Enterprise and Ultimate editions with Revenue Line Items enabled, users can search for and select products as revenue line items from the Product Catalog via the line item's Product field.	Users can search for and select products as quoted line items from the Product Catalog from the quote worksheet or by using the Product Catalog dashlet on the quote's create and record views. For Enterprise and Ultimate editions with Revenue Line Items enabled, users can search for and select products as revenue line items from the Product Catalog via a line item's Product field or by using the Product Catalog dashlet on the opportunity's create and record views.
	Saved Reports Chart Dashlet	Users may click on "Edit Selected Report" in a Saved Reports dashlet's settings to navigate to its edit view in the Reports	The Saved Reports Chart Dashlet contains a "View Report" option under the Gear menu allowing users to access the

		module.	originating report's detail view. The "Edit Selected Report" link is no longer displayed in dashlet's configuration page.
		When adding or editing the Saved Reports Chart dashlet, users can choose their desired report by selecting from the list of available reports which appear in the Select a Report field.	The Select a Report field now allows users to search and select their desired report when adding or editing the Saved Reports Chart dashlet.
		The Saved Reports Chart dashlet allows users to select a pre-defined report chart or a custom report chart to view via the dashlet.	Users can now click on a segment of the chart displayed in the dashlet to open a drawer containing a filtered list view showing the records belonging to that segment.
Emails	User Interface	The Emails module uses the Legacy user interface and has a traditional email client look and feel.	The Emails module uses the Sidecar interface and no longer resembles an email client.
	Basic Functionality	The Emails module can be used as an email client for users to send and receive email messages and manage email in folders.	The Emails module cannot be used as an email client. Instead, the Emails module contains copies of email messages sent from Sugar or archived via one of the

			various email archiving options. Users can view and work with email records much like they view and work with records in other Sidecar modules.
	Composing Emails	The email composer contains an Options button that opens a side panel where users can select a signature, template, or attachment(s).	The email composer toolbar has been redesigned and contains individual buttons for inserting an email signature, template, or attachment(s).
	Creating Records From Emails	When viewing an email record, there is an option to create a Sugar record from the email. Doing so will automatically relate the record to the email and, for some records (e.g. bugs), copy data from the email's content into the new record's description.	When viewing an email record, you can create related Sugar records from the subpanels. Creating records (e.g. bugs) from emails will not copy data from the email into the new record's description.
	Draft Emails	Draft emails are visible to members of the email's team(s) with the proper role permissions.	Draft emails are only visible to the created-by user and the administrator.
	Email Folders	The Emails module contains a folder structure where users can organize messages,	Emails are presented in typical list-view format; users can create and save filters to

		including those from Inbound Email accounts.	organize their messages.
	Email Status	Email records may have a status of Read, Unread, Sent, etc.	Email records have a status of Draft or Archived.
	Group Inbound Mail	If a group inbound mailbox has been configured with "Create Case from Email" disabled, the group's incoming messages will default to Admin as the assigned user.	If a group inbound mailbox has been configured with "Create Case from Email" disabled, the "Assigned To" field will be empty for the group's incoming messages.
	Settings (user)	The user can set email preferences (e.g. "Signatures Above Reply", "Send Plain Text Emails Only") in the Emails module by clicking the "Settings" button.	The settings for the user's email preferences have been removed.
	Opt-Out Status	The opt-out status is not readily visible for email addresses that are marked as opted-out.	Email addresses that are marked as opted-out will now display the opt-out status which is indicated by a blue circle with a line through it.
Quotes	Copy Quotes	Quotes cannot be created via duplication.	There is now a Copy option in the Quotes record view menu.
Reports	Drill-Through Report Charts	Users have the option to display the data in reports as a chart. The chart option is available for	Users can now click on a segment of a report's chart to open a drawer containing a filtered list view

		Summation with Details-type, Summation-type, and Matrix-type reports.	showing the records belonging to that segment.
User Interface	Audit Log	Users can view the history of changes to audited fields for records via the change log by selecting "View Change Log" from the record view's Actions menu.	Sugar's change log is now called "Audit Log" and it can be accessed by selecting "View Audit Log" from the Actions menu. The audit log now captures the setting of fields starting at record creation, includes the source from which each field change originated, and displays the name of the current record in the audit log header. Email addresses now have a separate audit log which can be accessed from the Audit Log page and records when the address is marked as opted-out or invalid.
		The change log is not available for the Targets module.	Users can now view a history of changes to audited fields for target records via the audit log.
	Teams Filter	One team may be selected at a time when filtering based on the Teams	Multiple team selection is supported when filtering based on

		field in Sidecar modules.	the Teams field in Sidecar modules.
Web-to-Lead	Opt-In Option	A web-to-lead form can be created in Sugar and placed on an external website for visitors to complete/submit and have their information be entered as a new lead record.	When creating a web-to-lead form, an opt-in checkbox now gets added to forms containing email address fields to allow visitors to explicitly indicate that they wish to receive marketing emails. Web-to-lead forms should be re-generated to now include the opt-in field accordingly.

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